

PROMOTE THE USE OF E-BUSINESS IN THE SME COMMUNITY

ISU-Lite Form with DTTN User Manual

Version 0.2

Date: 10 Oct 2007

Copyright © by Infinite Financial Solutions Limited. 

All rights reserved. The materials in this document are confidential and proprietary to Infinite Financial Solutions Limited and no part of these materials should be reproduced, published or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or any information storage or retrieval system, nor should the materials be disclosed to third parties, without written permission.

Table of Contents

System Installation.....	3
System Registration.....	9
Change Password.....	14
Source Code Application.....	15
User Maintenance.....	16
Broker maintenance.....	18
Customer Maintenance.....	21
Enquiry Function.....	23
Create Application.....	25
Receive Quotation.....	31
Receive Cover Note and Insurance Invoice.....	33
Receive Payment Confirmation.....	34
Receive Insurance Policy or Certificate.....	35
Create Declaration.....	37
Connect DTTN	40
Send documents to DTTN.....	40
Receive documents from DTTN.....	42

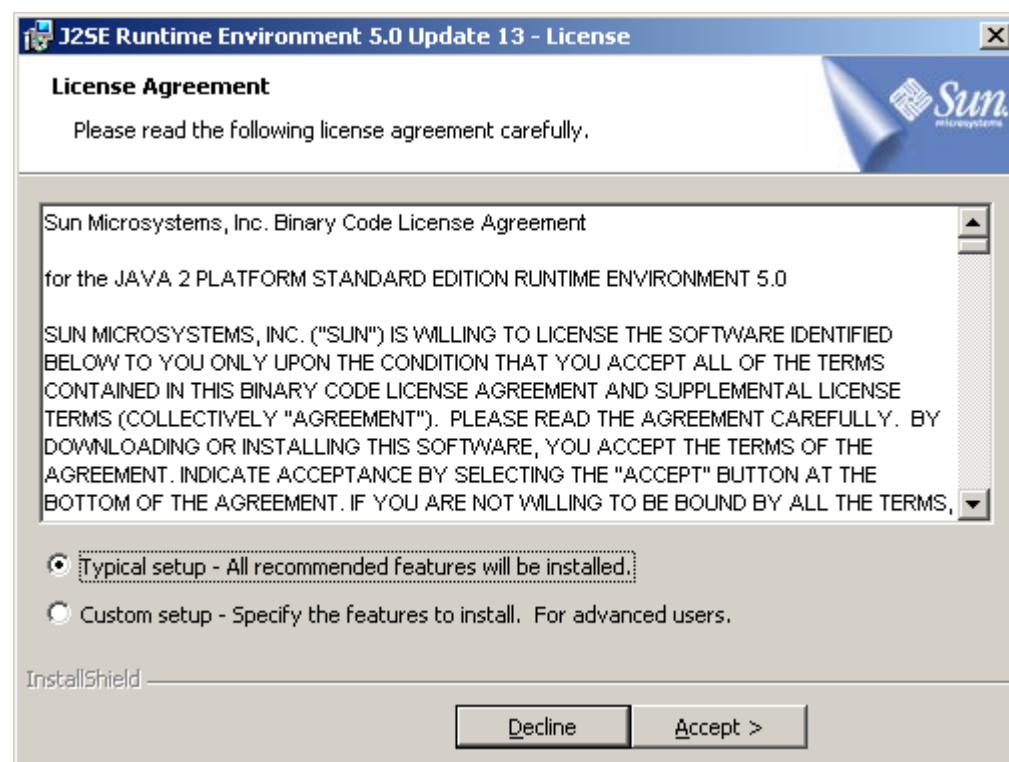
System Installation

The installation of ISU-Lite is simple. You can install the system in PC meeting the following requirement:

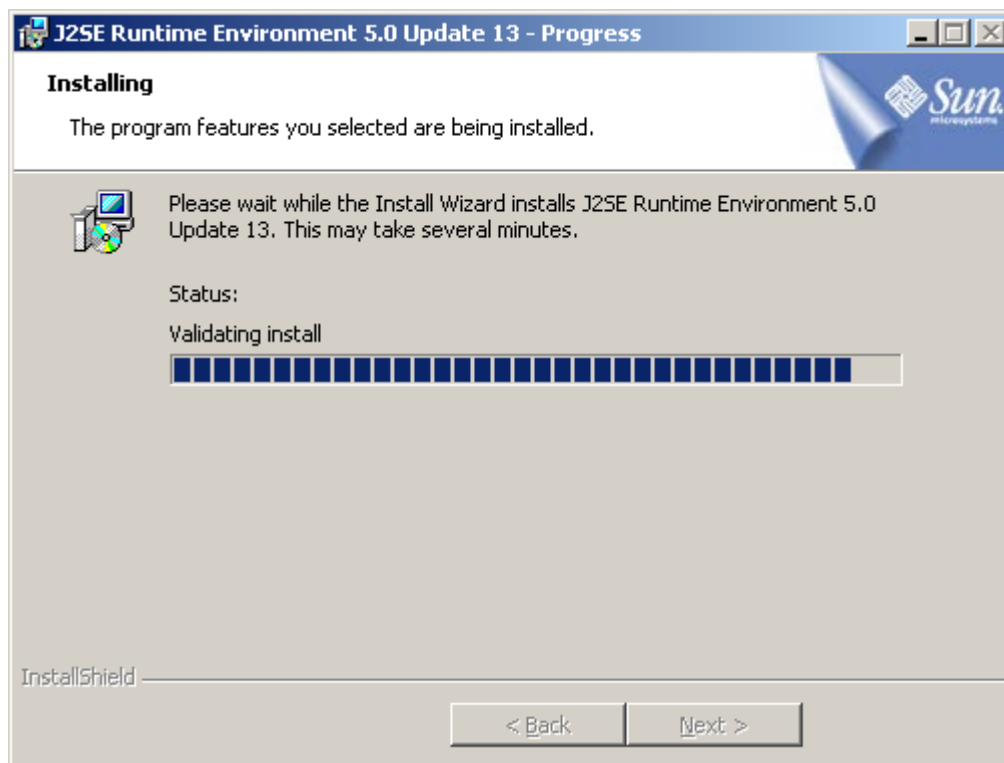
- Intel PC with Pentium 3 (/AMD K7) or above with 10/100BaseT Ethernet Network Interface Card and 512MB RAM or above
- Display resolution 1024 x 768
- Microsoft Windows 98, ME, 2000 or XP (English or Traditional Chinese Version)
- Printer Driver
- Sun Java Running Environment (JRE) 1.5 or above
- Internet Explorer 6.0

For installation, please insert the installation CD and then follow the instruction of the installation program.

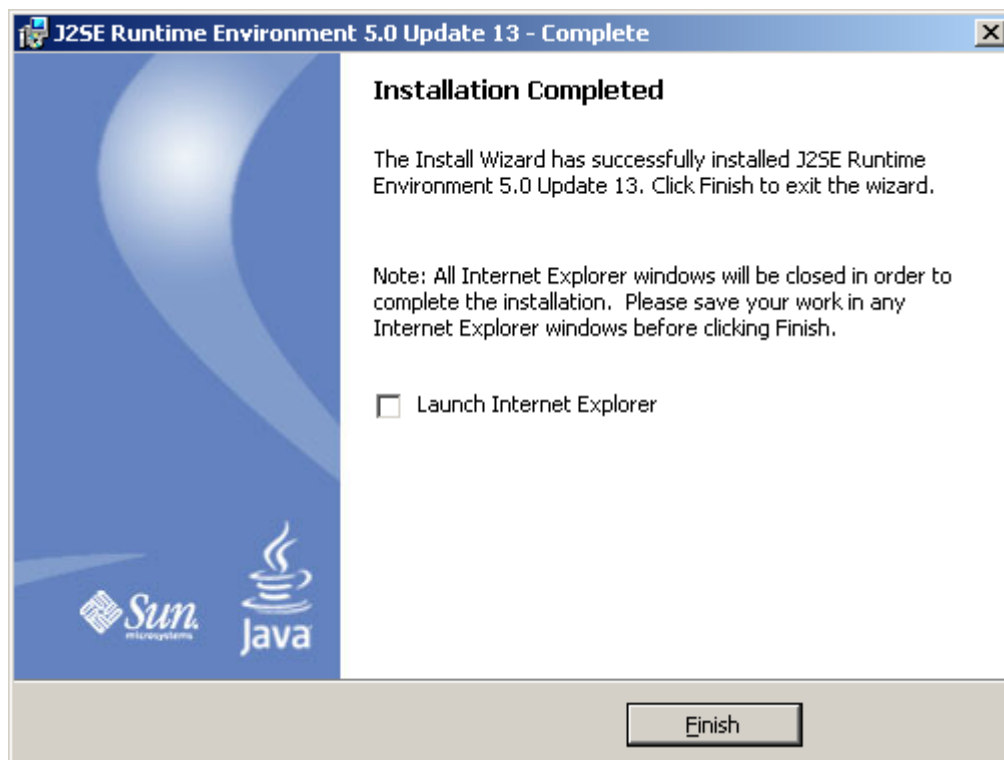
If the PC does not have JRE 1.5 or above installed, the installation program will prompt to install JRE 1.5



Check “Typical setup” and click Accept



The JRE will start to install

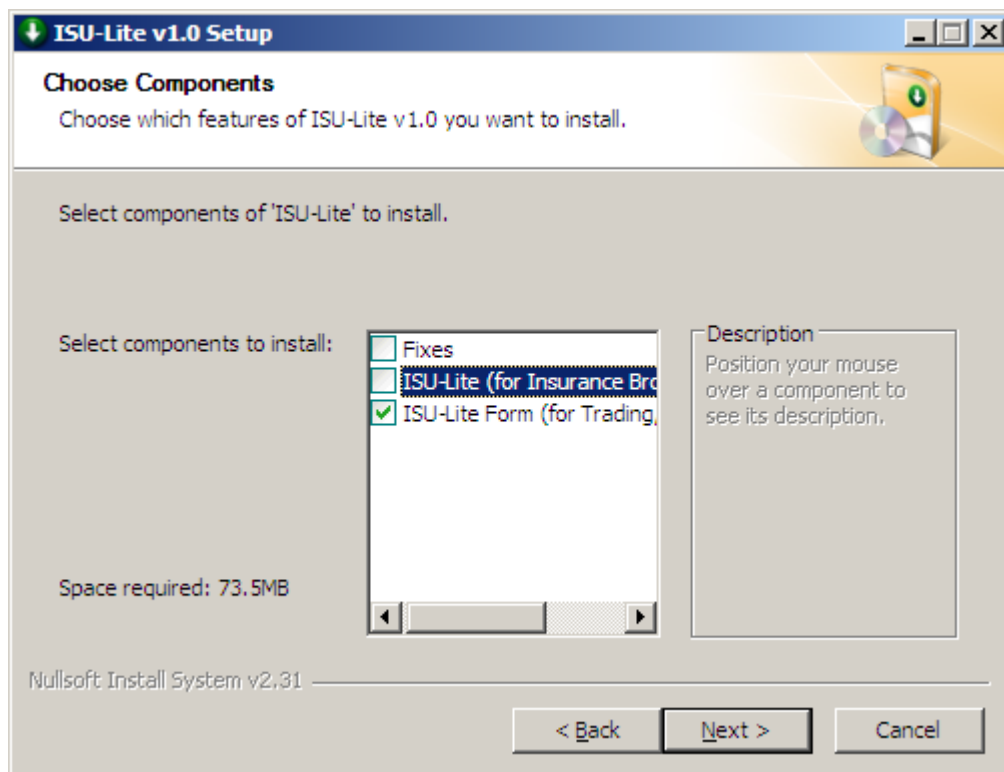


Click Finish at the end of the JRE 1.5 setup

After JRE 1.5 installed or JRE 1.5 or above had been installed on the PC, ISU-Lite installation screen will prompt



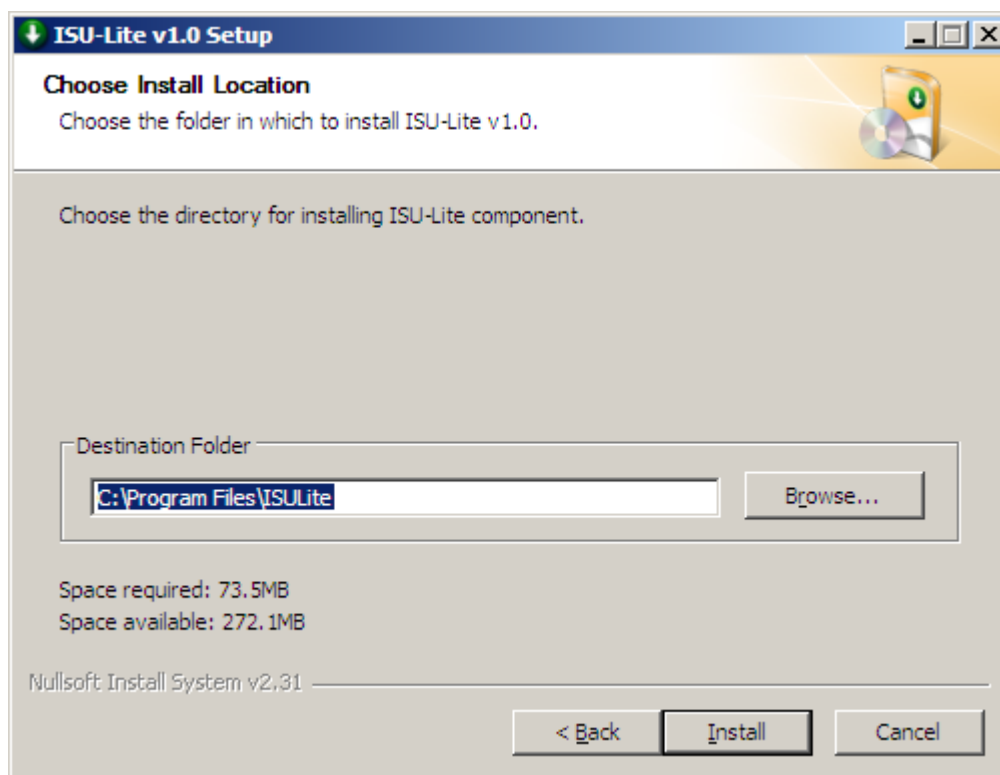
Click Next



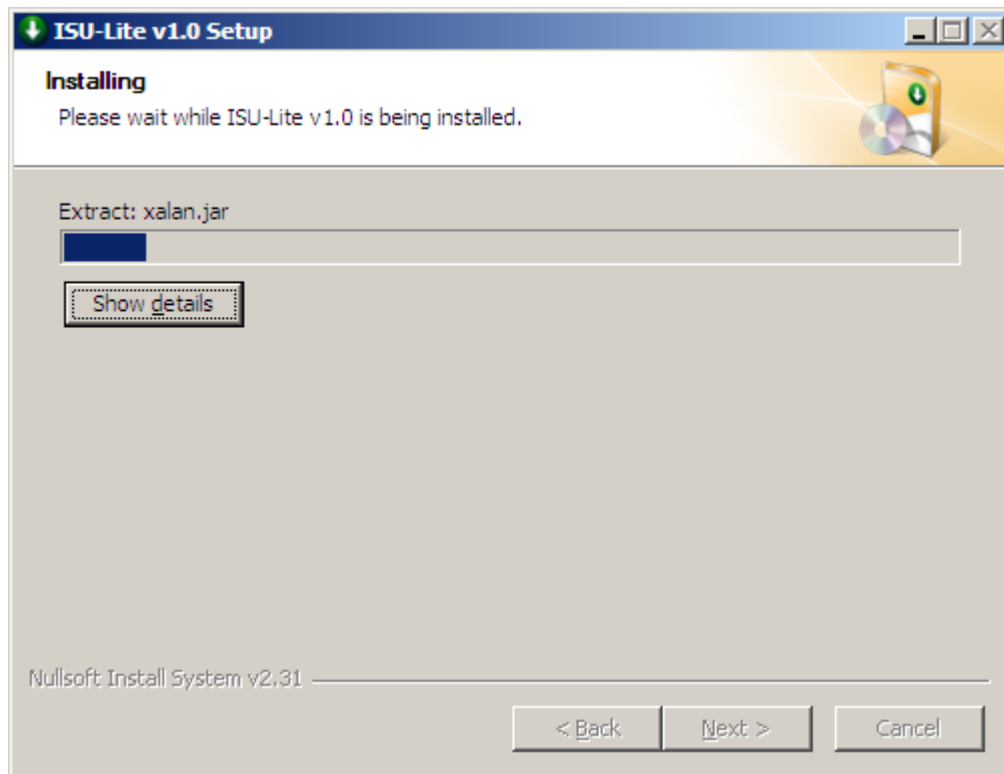
ISU-Lite Form

There will be three components available for installation, click the last one 'ISU-Lite Form (for Trading/Shipping SME) for installation. Then click Next.

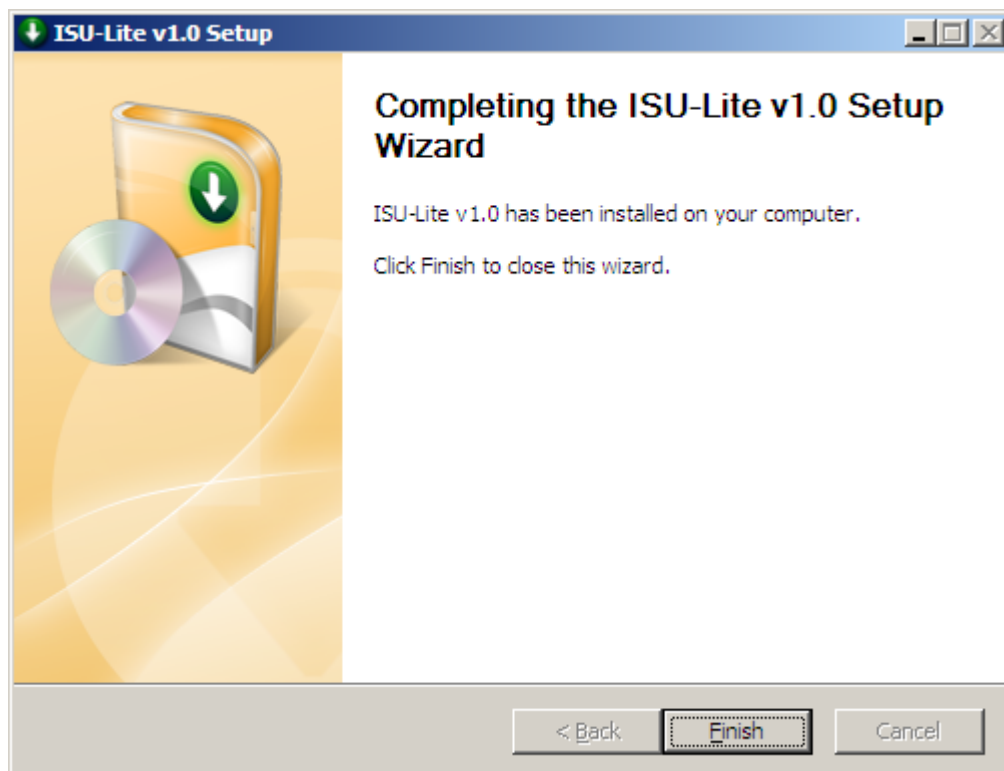
Then, the following screen will be shown and you can change the default installation directory. Please make sure you have sufficient disk space in doing so.



After selecting the right installation path, click Next. The program files are being copied to your workstation.



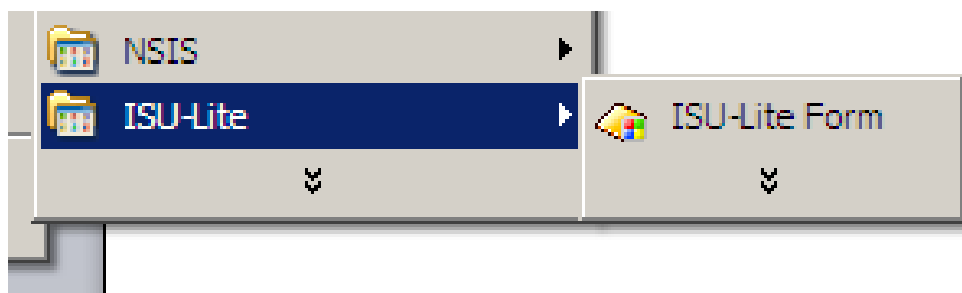
Finally, the installation completed screen will be shown as below:



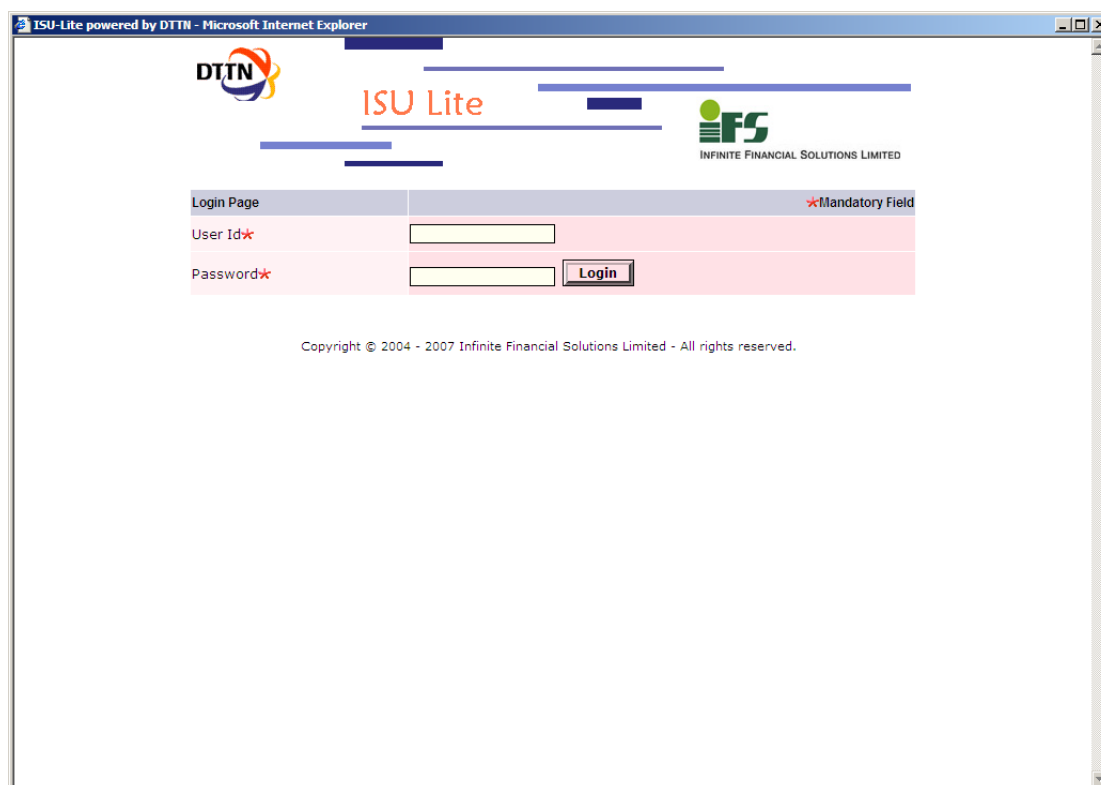
Click Finish to complete the installation process.

You can start the program by following the 'Start', 'Program' menu and select ISU-Lite Form from ISU-Lite program group:

ISU-Lite Form



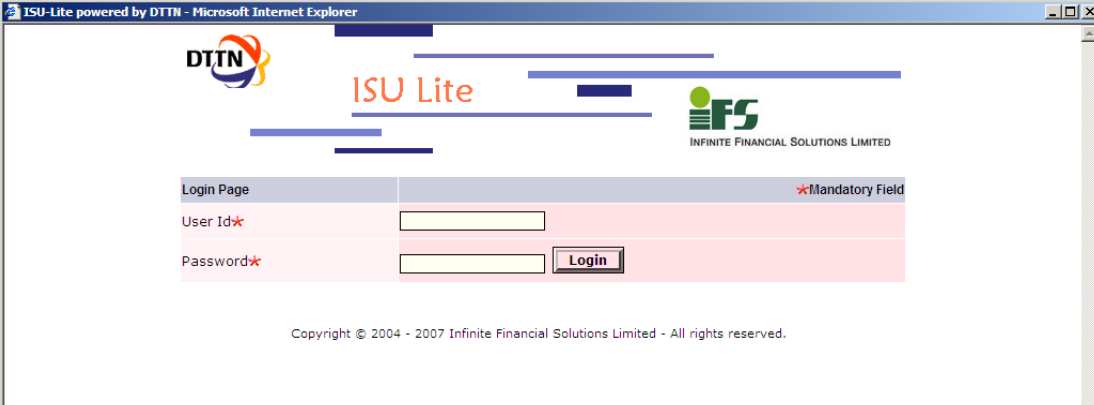
The following screen will be popped up:



Your installation is completed now and you can follow the registration step to start using ISU-Lite Form now.

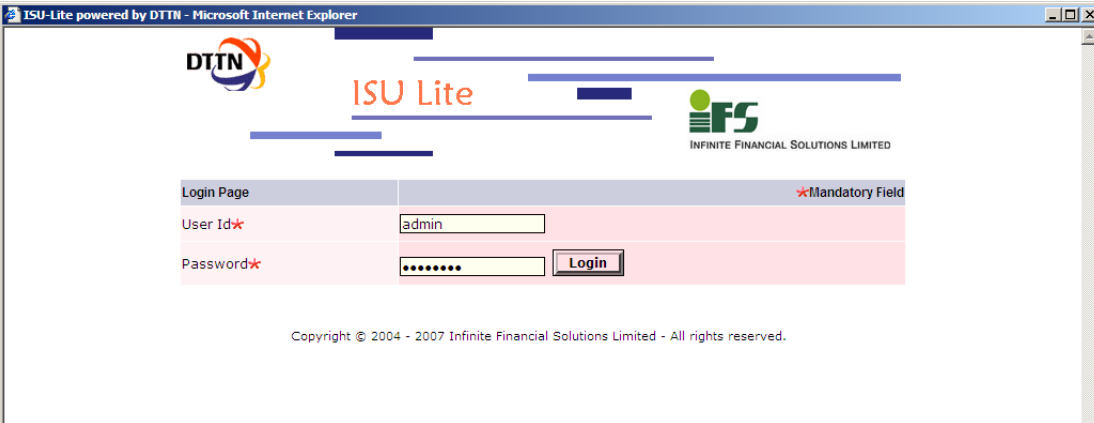
System Registration

After installing the software successfully, you have to register the system before it can be used. Firstly, please start the application by clicking the icon on desktop. Then, you can see the login screen as below:

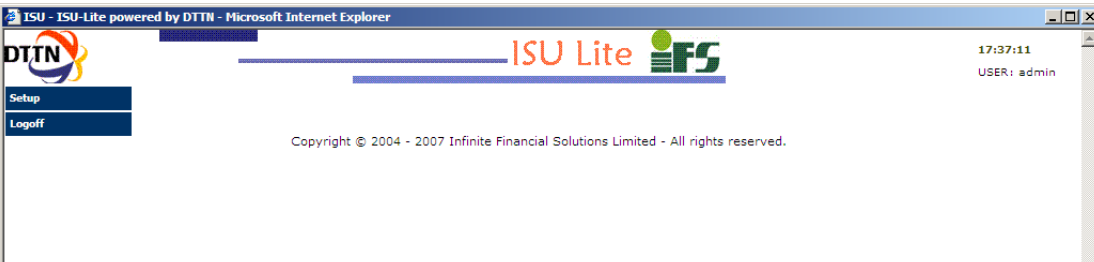


There is a default administrator built-in in the system. Please login the system with the information as below:

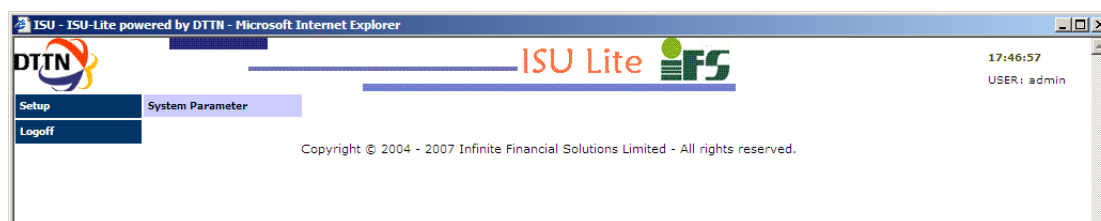
User ID: admin Password: password



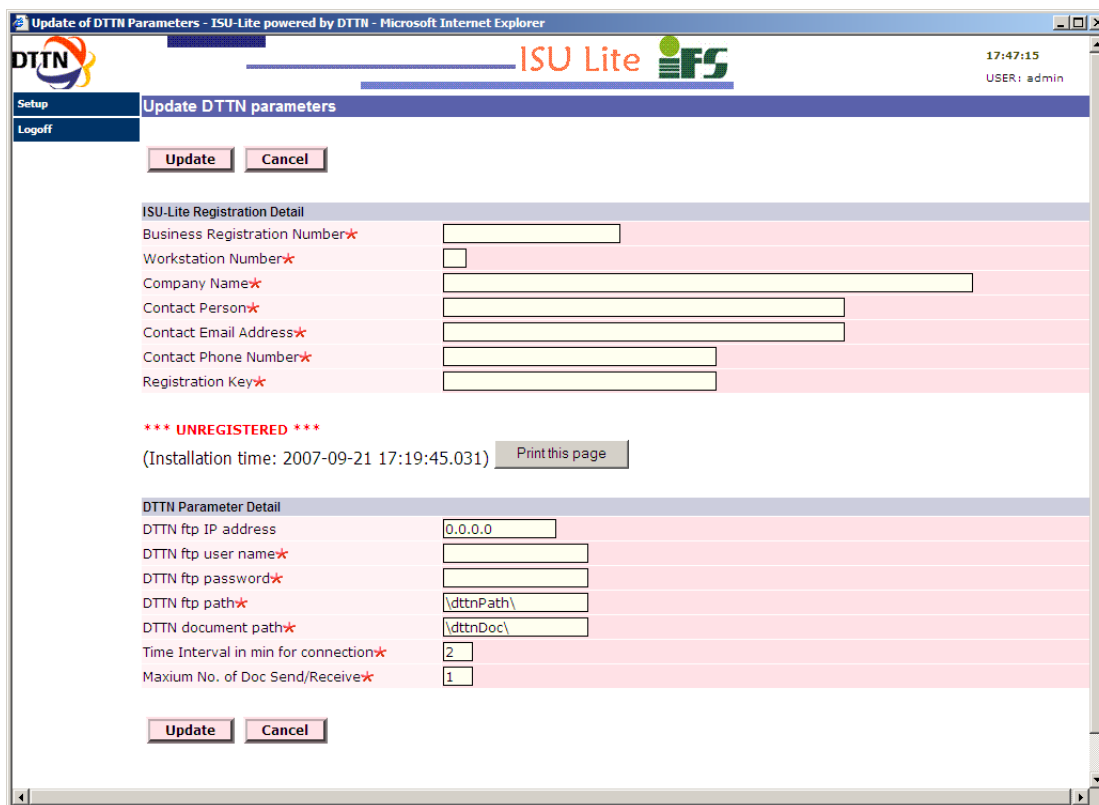
Next, press the 'Login' button, you will be able to sign-in the system. As the system is not yet registered, there are only two functions can be used. One is for setting up the system parameters and the other one is logoff.



Then, mouse over the 'Setup' menu and click the 'System Paramter' sub-menu as below:



The 'Update DTTN parameters' function page appears. You can see that the "*** UNREGISTERED ***" message is shown with installation time.

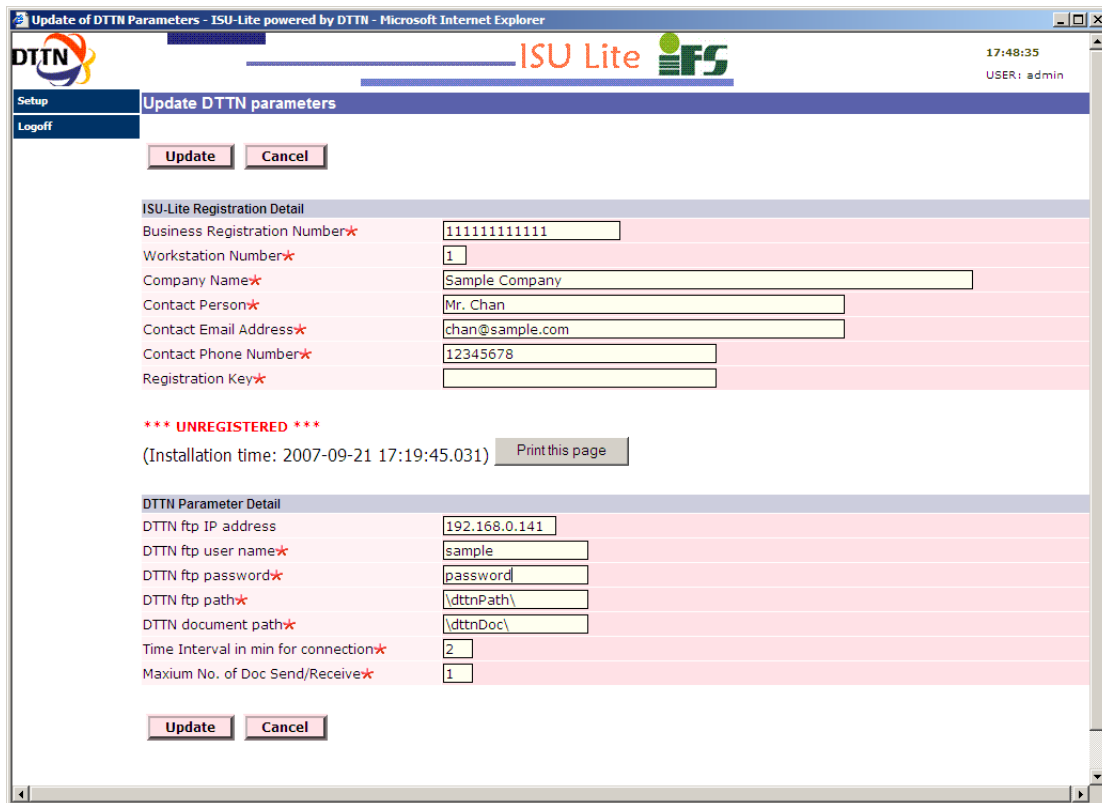


The meanings of the parameters are as follows:

Parameter	Description
Business Registration Number	The business registration number of your company
Workstation Number	It is the workstation number with ISULite installed. 2 free workstations installation can be used.
Company Name	The name of your company
Contact Person	The primary contact person of your company
Contact Email Address	The email address of the contact person
Contact Phone Number	The phone number of the contact person
Registration Key	The key required for registering the system for use
DTTN ftp IP	The IP address of DTTN host for sending and receiving documents by File Transfer Protocol (ftp)
DTTN ftp user name	The user name for connecting to DTTN host
DTTN ftp password	The password of the user for connecting to

	DTTN host
DTTN ftp path	The local path for storing ftp documents. The system will create this path for you.
DTTN document path	The path where DTTN document is stored, the system will create this path for you.
Time interval in min for connection	This is the time interval in minutes for blocking the re-connection to DTTN. Used for traffic volume control.
Maximum No. of Doc Send/Receive	This is the maximum number of document sent to or received from DTTN each time. Used for traffic volume control.

The DTTN parameter detail will be provided by DTTNCo. You do not need to complete these information for registration. However, the ISU Lite registration parameters must be completed before registration can be done successfully.



Update of DTTN Parameters - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite IFS 17:48:35 USER: admin

Setup Update DTTN parameters Logoff

Update Cancel

ISU-Lite Registration Detail

Business Registration Number★ 1111111111

Workstation Number★ 1

Company Name★ Sample Company

Contact Person★ Mr. Chan

Contact Email Address★ chan@sample.com

Contact Phone Number★ 12345678

Registration Key★

*** UNREGISTERED ***

(Installation time: 2007-09-21 17:19:45.031) Print this page

DTTN Parameter Detail

DTTN ftp IP address 192.168.0.141

DTTN ftp user name★ sample

DTTN ftp password★ password

DTTN ftp path★ \dtnPath\

DTTN document path★ \dtnDoc\

Time Interval in min for connection★ 2

Maximum No. of Doc Send/Receive★ 1

Update Cancel

After completing the detail as above, you can click the 'Update' button to store the information in the system. Then, you can click the print button to print the screen information. Next, you can fax the screen printout to IFS (fax number: 2134-1292) for registration. A registration key will be provided to you afterwards.

Update of DTTN Parameters - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite IFS 17:52:50 USER: admin

Setup Logoff

Update DTTN parameters

Update Cancel

ISU-Lite Registration Detail

Business Registration Number★ 111111111111

Workstation Number★ 1

Company Name★ Sample Company

Contact Person★ Mr. Chan

Contact Email Address★ chan@sample.com

Contact Phone Number★ 12345678

Registration Key★ 2f9dc6ca7d8b65c3c2944df937b9db9d

*** UNREGISTERED ***

(Installation time: 2007-09-21 17:19:45.031) Print this page

DTTN Parameter Detail

DTTN ftp IP address 192.168.0.141

DTTN ftp user name★ sample

DTTN ftp password★ password

DTTN ftp path★ \dtnPath\

DTTN document path★ \dtnDoc\

Time Interval in min for connection★ 2

Maxium No. of Doc Send/Receive★ 1

Update Cancel

After received the resigration key, please input the key in the 'Registration Key' field. Click update to store the key into the system.

Action Completed - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite IFS 17:49:30 USER: admin

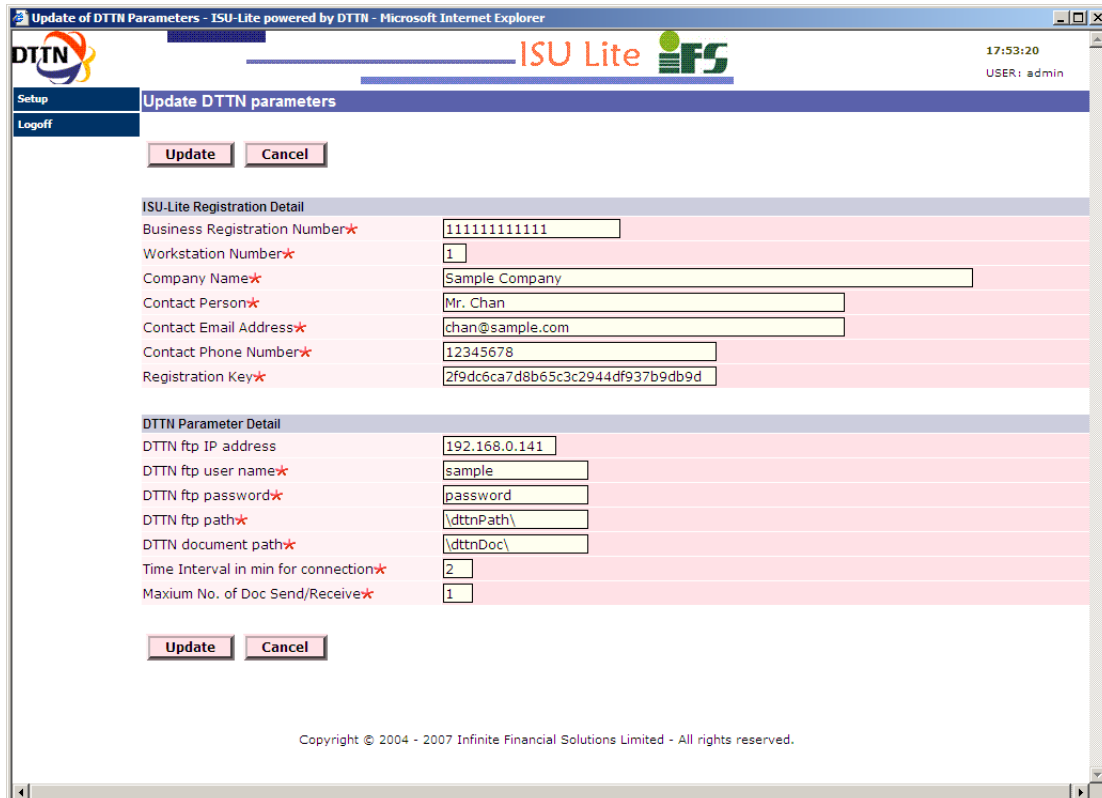
Setup Logoff

UPDATE action is successfully completed.

OK

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Then, you can see that the '*** UNREGISTERED ***' message disappeared as below:



Update of DTTN Parameters - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite IFS

17:53:20
USER: admin

Setup
Logoff

Update DTTN parameters

Update Cancel

ISU-Lite Registration Detail

Business Registration Number*	111111111111
Workstation Number*	1
Company Name*	Sample Company
Contact Person*	Mr. Chan
Contact Email Address*	chan@sample.com
Contact Phone Number*	12345678
Registration Key*	2f9dc6ca7d8b65c3c2944df937b9db9d


DTTN Parameter Detail

DTTN ftp IP address	192.168.0.141
DTTN ftp user name*	sample
DTTN ftp password*	password
DTTN ftp path*	\\dttnPath\
DTTN document path*	\\dttnDoc\
Time Interval in min for connection*	2
Maximum No. of Doc Send/Receive*	1

Update Cancel

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

After successful registration, you can logoff and login the system again. The full function can be used by the administrator now.



ISU - ISU-Lite powered by DTTN - Microsoft Internet Explorer

ISU Lite FORM IFS

17:53:39
USER: admin

Connect DTTN
Create Application
Maintain Application
Maintain Policy
Process Payment
Enquiry
Setup
Logoff

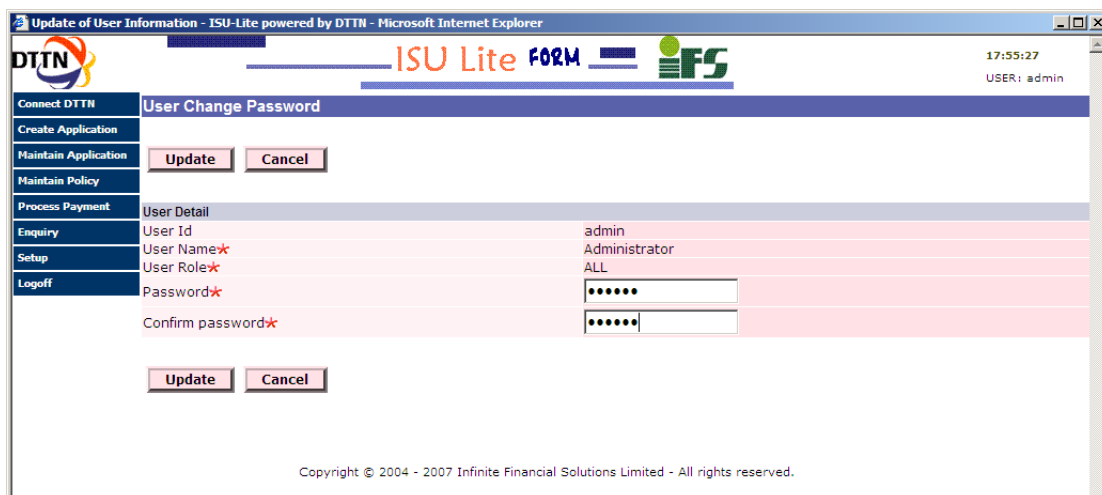
Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Change Password

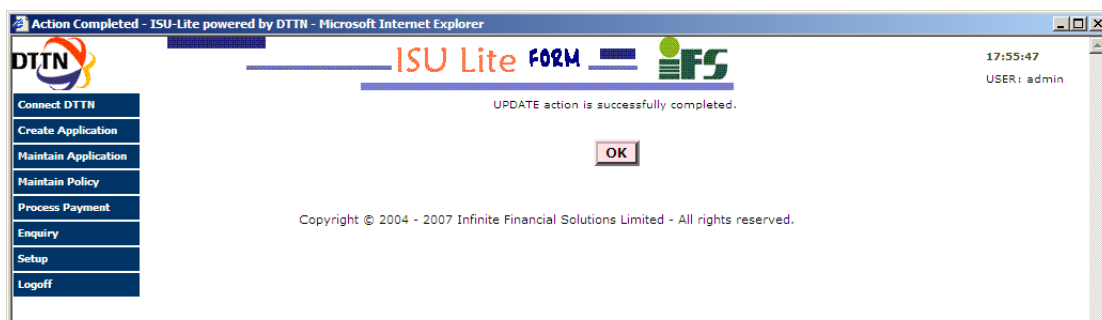
It is suggested changing the password of administrator immediately. Mouse over the 'Setup' menu and click 'Change Password'.



Input the new password and confirm the new password in the screen as below:



Click the Update button to update the password.



Then you can logoff the system and login again with the new password.

Source Code Application

As you have already made the registration with us, source code of the ISU-Lite is also available for your application.

To make the application, it is necessary for you to quote “ISU-Lite Source Code Application” on a form and fax to 2134 - 1292 together with the following information:

- Company Name
- Contact Person
- Contact E-mail Address
- Contact Phone Number

The source code will be provided to you afterwards.

User Maintenance

You can create new users in the system with pre-defined functional groups. There are the following functional groups with different functional rights:

Function	ALL	Supervis or	Operator
Connect DTTN	Yes	Yes	No
Create Application	Yes	Yes	Yes
Maintain Application	Yes	Yes	Yes
Maintain Policy	Yes	Yes	Yes
Process Payment	Yes	Yes	Yes
Enquiry	Yes	Yes	Yes
Setup			
Change Password	Yes	Yes	Yes
System User Maintenance	Yes	No	No
Broker Maintenance	Yes	Yes	No
Insurer Maintenance	Yes	Yes	No
Customer Maintenance	Yes	Yes	No
System Parameter Maintenance	Yes	No	No

Select 'System User' from the 'Setup' menu.

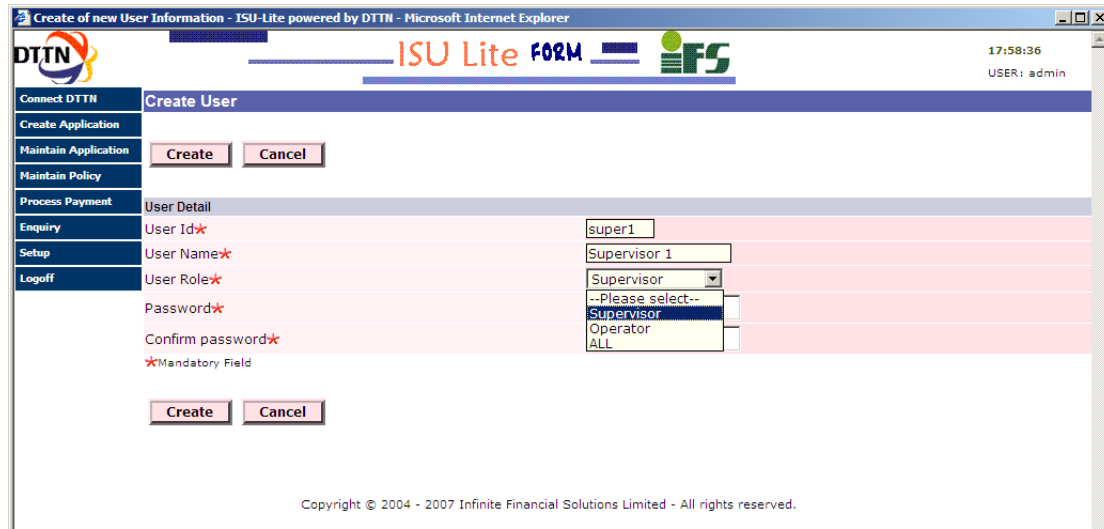


The system user list will be shown as below.

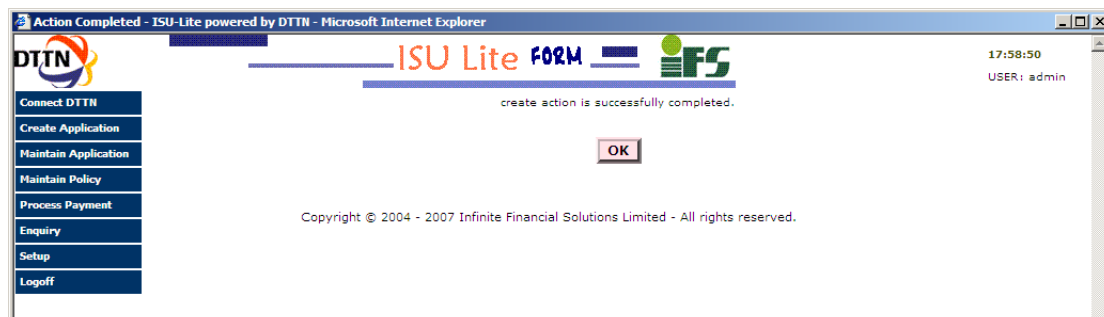


You can click the 'Create' button to create a new system user or select a user then click 'Update' to update the user information; 'Enquire' to view the user information or 'Delete' to delete the system user.


For creating a new user, the screen is shown as below:



Just input the details and click the 'Create' button to create the new user.



After the creation, you can see the list of customer with the newly added.



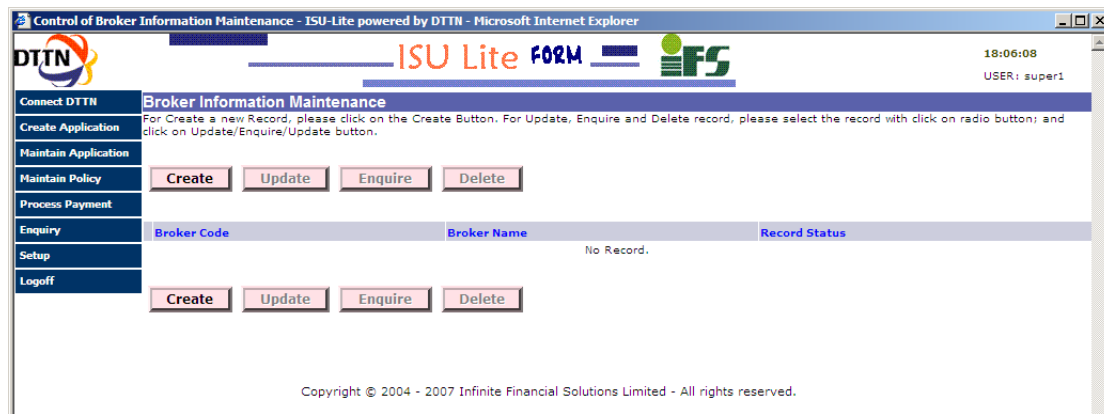
	User Id	User Name	User Role
Setup	<input type="radio"/> admin	Administrator	ALL
Logoff	<input type="radio"/> super1	Supervisor 1	Supervisor

Broker maintenance

You can maintain the available brokers in the system through the broker maintenance function. Select 'Broker' from the 'Setup' menu.



Similar to 'System User' maintenance, a list of available brokers will be shown.



Click the 'Create' button, then a screen of broker information will be shown as below.

You can input the detail accordingly. Click 'Create' to go to the 'Confirmation' page or 'Cancel' to cancel the creation.

Create of new Broker Information - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS 18:07:25
USER: super1

Create Broker Information

Connect DTTN

Create Application

Maintain Application

Maintain Policy

Process Payment

Enquiry

Setup

Logoff

Broker Detail

Broker Code★

Broker Name★

Address 1★

Address 2

Address 3

Chinese Address 1

Chinese Address 2

Chinese Address 3

Contact Person★

Contact Person Telephone★

Contact Person Email★

Premium Collection Account★

Host Current Account★

Broker Commission Percentage%★

★Mandatory Field

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Click 'Confirm' if the input information is correct.

Confirmation of Broker Information Creation - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS 18:07:37
USER: super1

Confirmation Broker Information Creation

Connect DTTN

Create Application

Maintain Application

Maintain Policy

Process Payment

Enquiry

Setup

Logoff

Broker Detail

Broker Code B1

Broker Name Sample Broker

Address 1 1 Broker Street Hong Kong

Address 2

Address 3

Chinese Address 1

Chinese Address 2

Chinese Address 3

Contact Person Mr. Lam

Contact Person Telephone 12345678

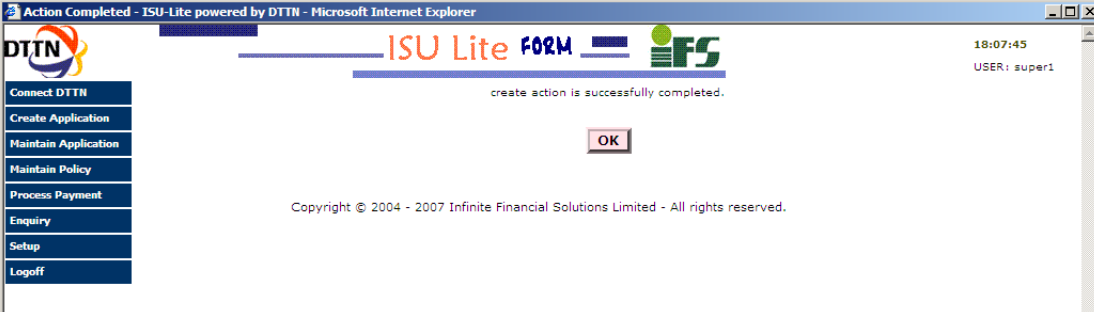
Contact Person Email lam@broker1.com

Premium Collection Account 0

Host Current Account 0

Broker Commission Percentage% 0

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.



DTTN **ISU Lite FORM** IFS

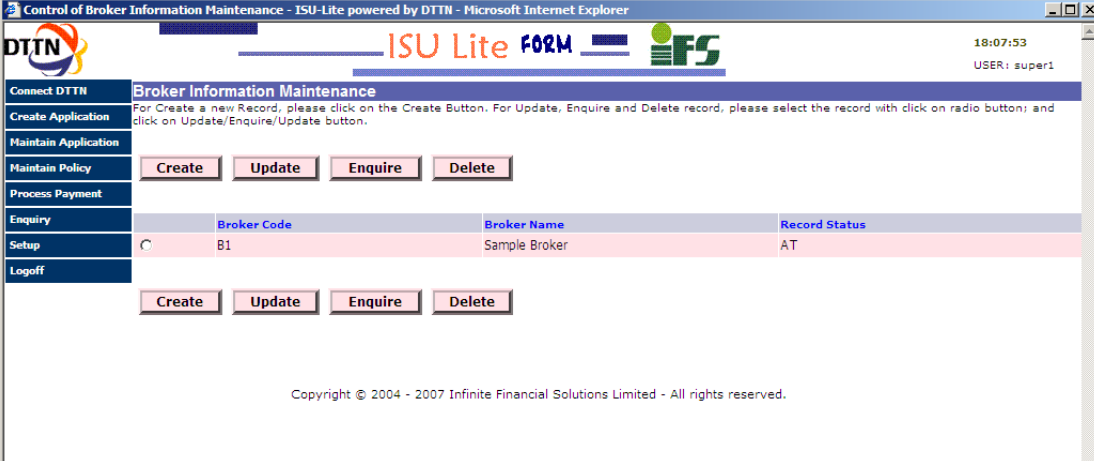
18:07:45
USER: super1

create action is successfully completed.

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Connect DTTN
Create Application
Maintain Application
Maintain Policy
Process Payment
Enquiry
Setup
Logoff

Now, you can see the newly created broker record.



DTTN **ISU Lite FORM** IFS

18:07:53
USER: super1

Broker Information Maintenance

For Create a new Record, please click on the Create Button. For Update, Enquire and Delete record, please select the record with click on radio button; and click on Update/Enquire/Delete button.

	Broker Code	Broker Name	Record Status
<input type="radio"/>	81	Sample Broker	AT

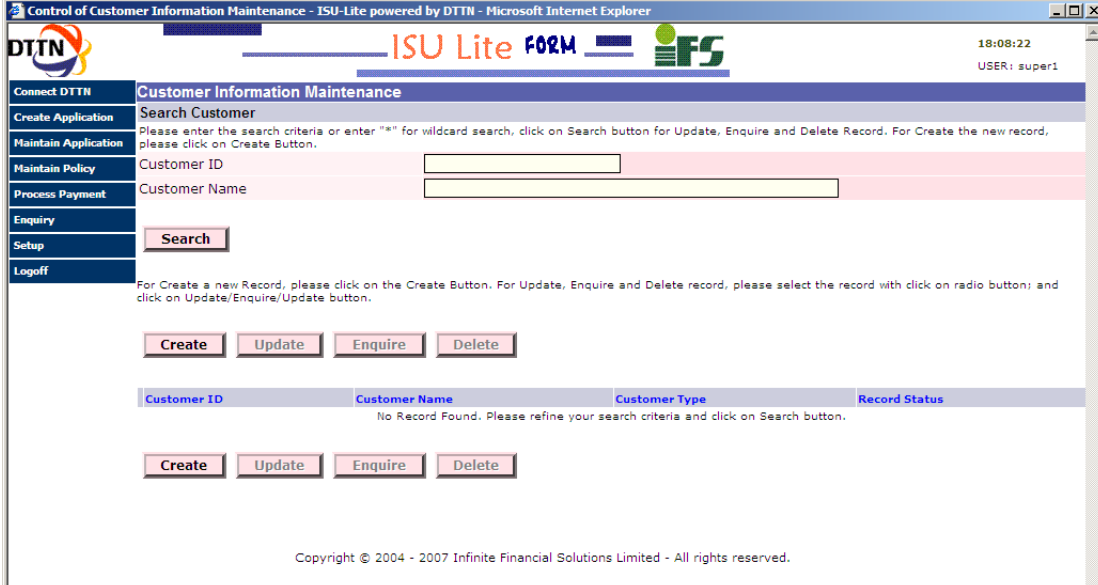
Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Connect DTTN
Create Application
Maintain Application
Maintain Policy
Process Payment
Enquiry
Setup
Logoff

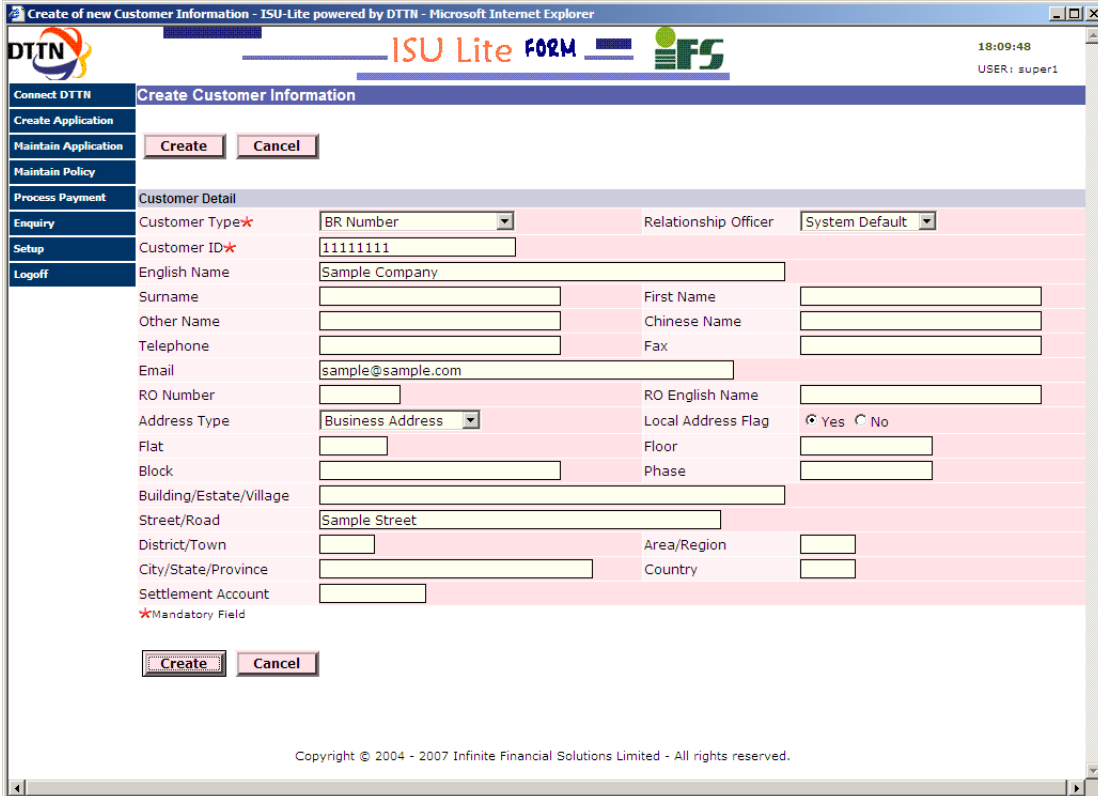
Customer Maintenance

The customer maintenance function is similar to broker maintenance as well as system user maintenance. The screens are captured below for easy reference.

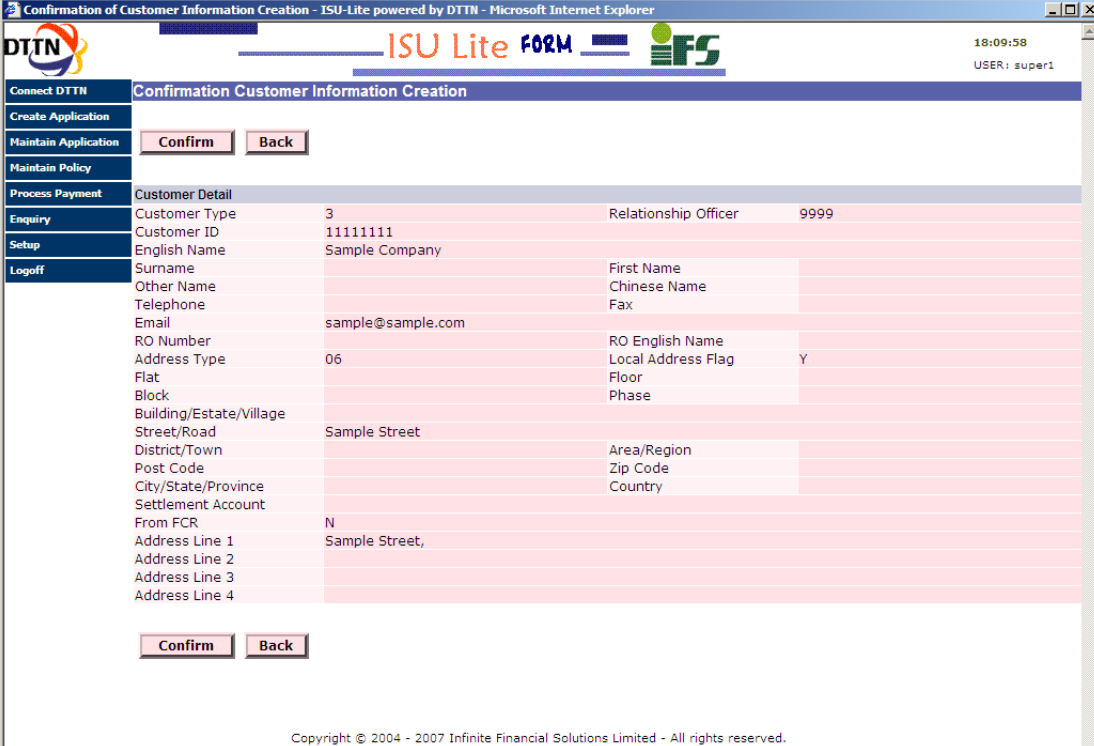
The screen below list the selected customers by the search criteria



Customer information creation form.



Confirmation page.



Confirmation of Customer Information Creation - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS 18:09:58
USER: super1

Confirmation Customer Information Creation

Connect DTTN
Create Application
Maintain Application **Confirm** **Back**
Maintain Policy
Process Payment
Enquiry
Setup
Logoff

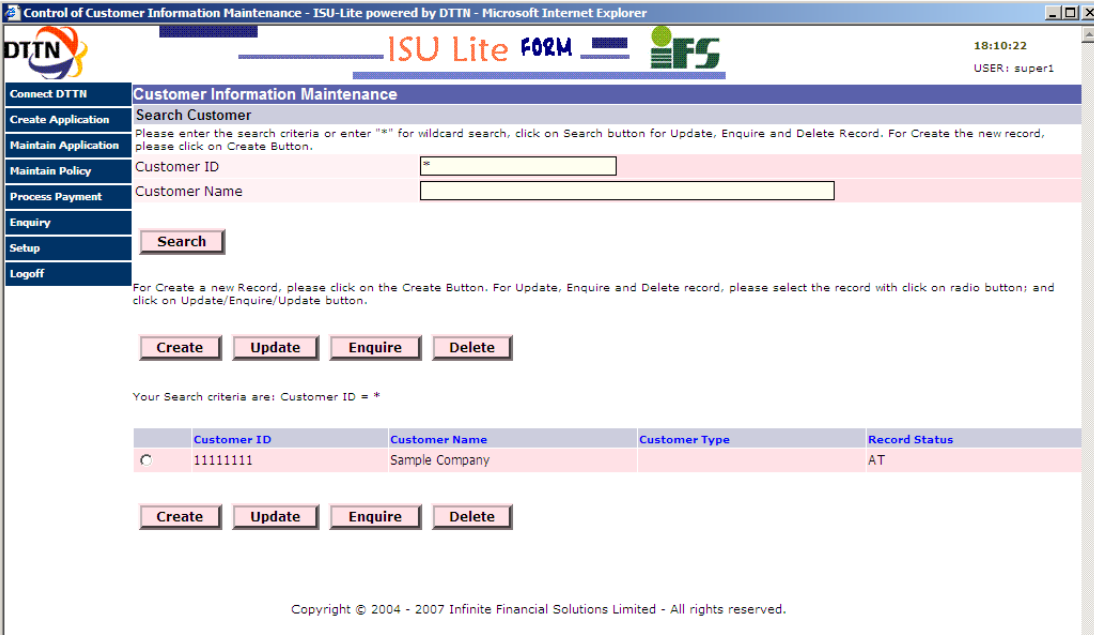
Customer Detail

Customer Type	3	Relationship Officer	9999
Customer ID	11111111		
English Name	Sample Company		
Surname		First Name	
Other Name		Chinese Name	
Telephone		Fax	
Email	sample@sample.com		
RO Number		RO English Name	
Address Type	06	Local Address Flag	Y
Flat		Floor	
Block		Phase	
Building/Estate/Village			
Street/Road	Sample Street		
District/Town		Area/Region	
Post Code		Zip Code	
City/State/Province		Country	
Settlement Account			
From FCR	N		
Address Line 1	Sample Street,		
Address Line 2			
Address Line 3			
Address Line 4			

Confirm **Back**

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Resulting list as below.



Control of Customer Information Maintenance - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS 18:10:22
USER: super1

Customer Information Maintenance

Connect DTTN
Create Application
Maintain Application
Maintain Policy
Process Payment
Enquiry
Setup
Logoff

Search Customer

Please enter the search criteria or enter "*" for wildcard search, click on Search button for Update, Enquire and Delete Record. For Create the new record, please click on Create Button.

Customer ID
Customer Name

Search

For Create a new Record, please click on the Create Button. For Update, Enquire and Delete record, please select the record with click on radio button; and click on Update/Enquire/Delete button.

Create **Update** **Enquire** **Delete**

Your Search criteria are: Customer ID = *

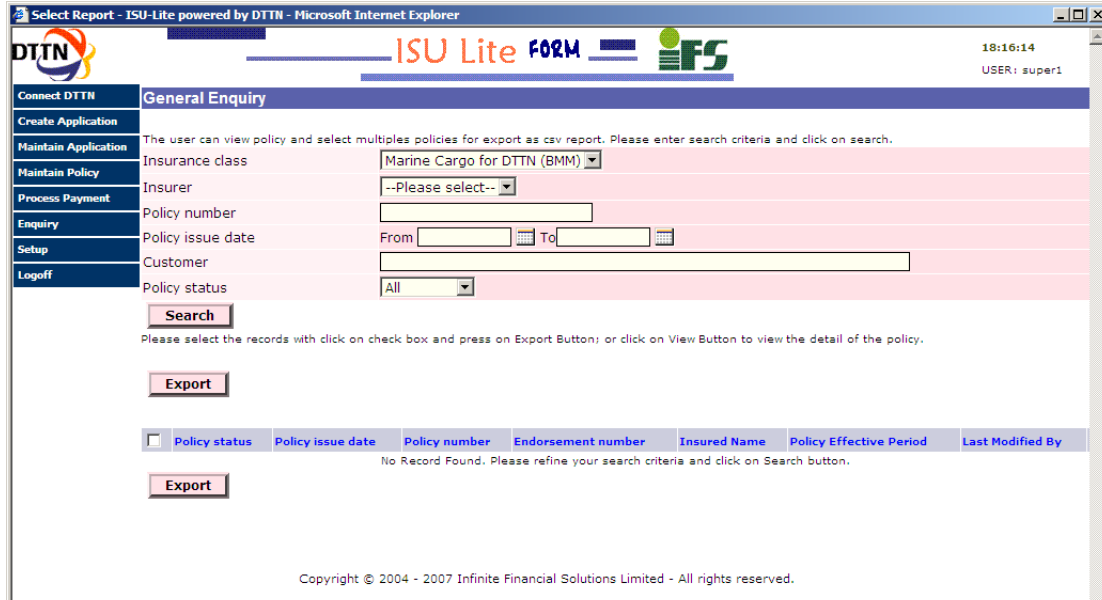
	Customer ID	Customer Name	Customer Type	Record Status
<input type="radio"/>	11111111	Sample Company		AT

Create **Update** **Enquire** **Delete**

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Enquiry Function

You can enquire the applications in the system through the 'Enquiry' function.



Select Report - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

18:16:14
USER: super1

General Enquiry

The user can view policy and select multiples policies for export as csv report. Please enter search criteria and click on search.

Insurance class: Marine Cargo for DTTN (BMM)

Insurer: --Please select--

Policy number:

Policy issue date: From To

Customer:

Policy status: All

Search

Please select the records with click on check box and press on Export Button; or click on View Button to view the detail of the policy.

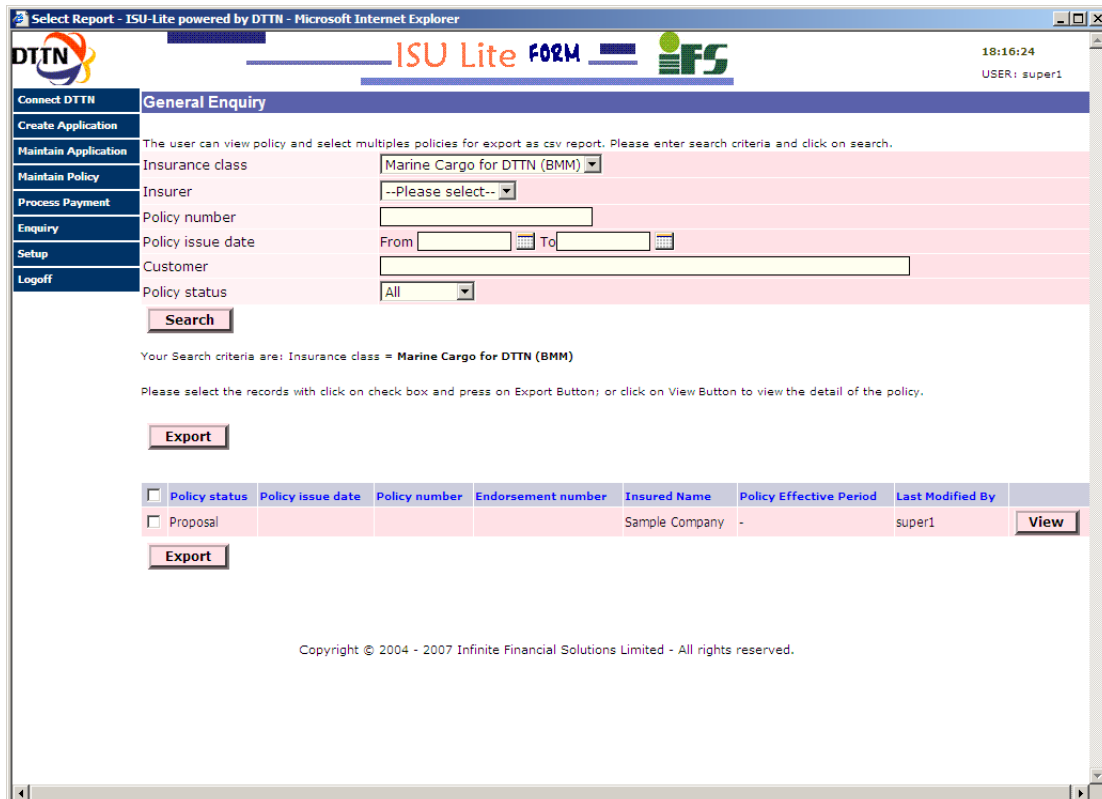
Export

<input type="checkbox"/>	Policy status	Policy issue date	Policy number	Endorsement number	Insured Name	Policy Effective Period	Last Modified By
No Record Found. Please refine your search criteria and click on Search button.							

Export

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

After input the search criteria, click the 'Search' button, a list of applications meeting the criteria will be shown.



Select Report - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

18:16:24
USER: super1

General Enquiry

The user can view policy and select multiples policies for export as csv report. Please enter search criteria and click on search.

Insurance class: Marine Cargo for DTTN (BMM)

Insurer: --Please select--

Policy number:

Policy issue date: From To

Customer:

Policy status: All

Search

Your Search criteria are: Insurance class = Marine Cargo for DTTN (BMM)

Please select the records with click on check box and press on Export Button; or click on View Button to view the detail of the policy.

Export

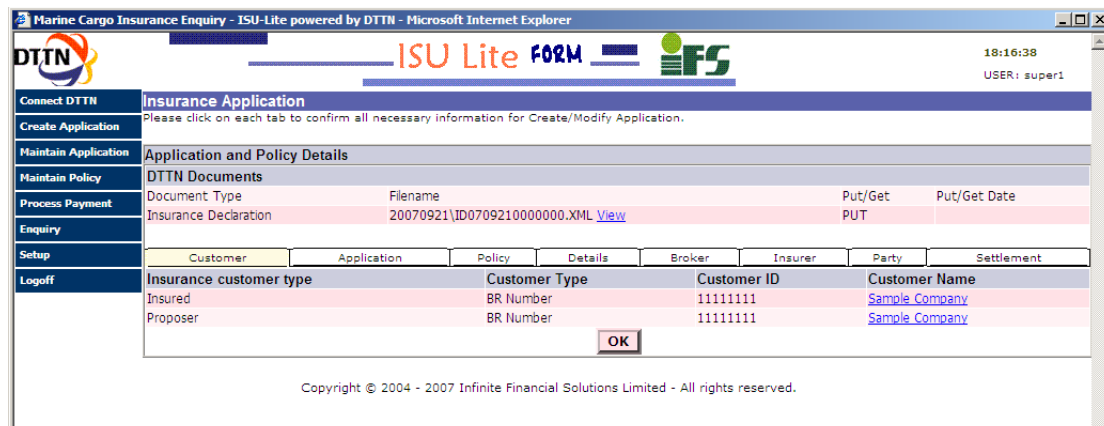
<input type="checkbox"/>	Policy status	Policy issue date	Policy number	Endorsement number	Insured Name	Policy Effective Period	Last Modified By
<input type="checkbox"/>	Proposal				Sample Company	-	super1

Export

View

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Click the 'View' button of the selected application to view the detail.



Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS 18:16:38 USER: super1

Connect DTTN **Insurance Application**

Create Application Please click on each tab to confirm all necessary information for Create/Modify Application.

Maintain Application **Application and Policy Details**

Maintain Policy **DTTN Documents**

Document Type	Filename	Put/Get	Put/Get Date
Insurance Declaration	20070921\ID0709210000000.XML View	PUT	

Process Payment

Enquiry

Setup

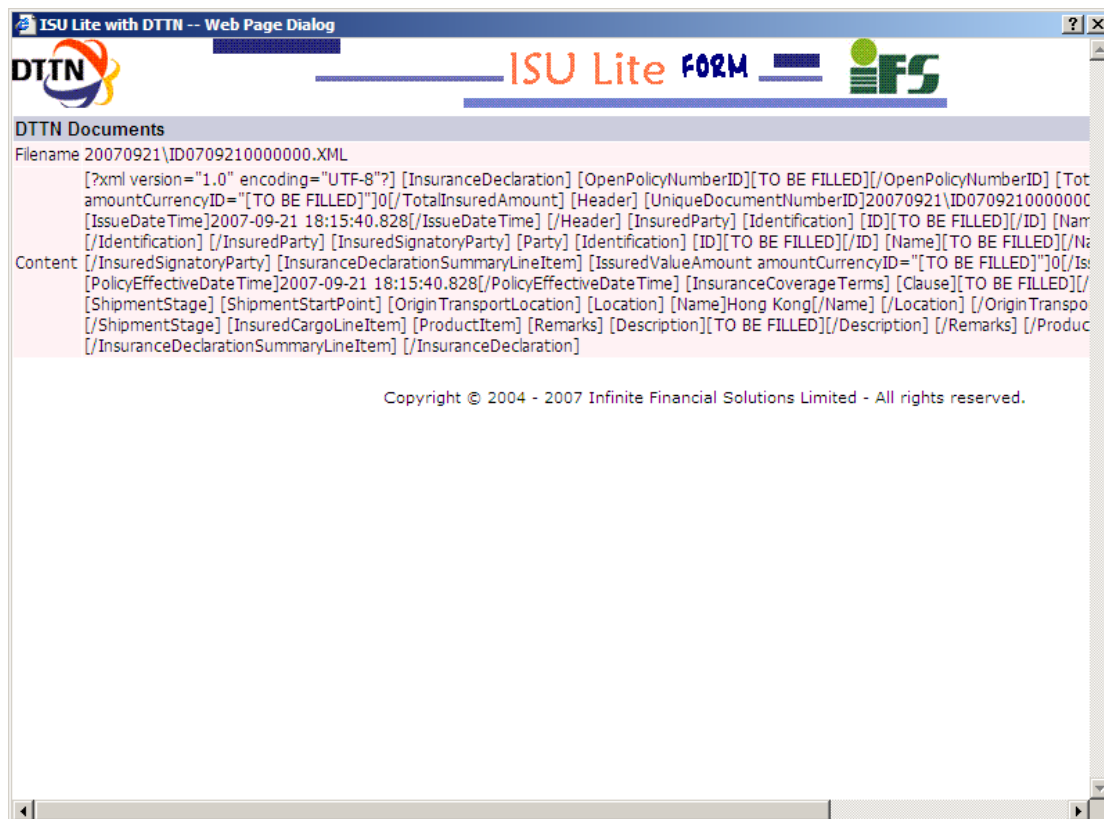
Logout

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insurance customer type	Customer Type	Customer ID	Customer Name				
Insured	BR Number	11111111	Sample Company				
Proposer	BR Number	11111111	Sample Company				

OK

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

The detail pages is similar to the creation page. However, the DTTN document list is also attached. You can click the link 'View' to see the document detail. The document detail will be popped up as below.



ISU Lite with DTTN -- Web Page Dialog

DTTN **ISU Lite FORM** IFS

DTTN Documents

Filename 20070921\ID0709210000000.XML

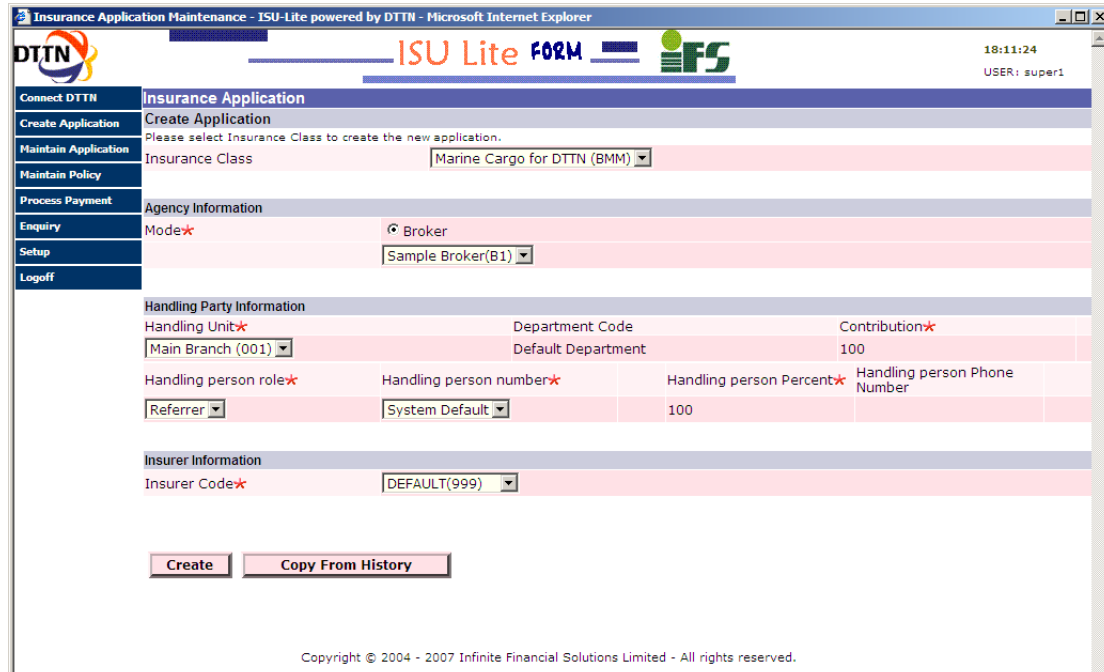
Content: [?xml version="1.0" encoding="UTF-8"?] [InsuranceDeclaration] [OpenPolicyNumberID][TO BE FILLED][OpenPolicyNumberID] [TotalInsuredAmountCurrencyID="[TO BE FILLED]"0[/TotalInsuredAmount] [Header] [UniqueDocumentNumberID]20070921\ID0709210000000 [IssueDateTime]2007-09-21 18:15:40.828[/IssueDateTime] [/Header] [InsuredParty] [Identification] [ID][TO BE FILLED][ID] [Name] [Identification] [/InsuredParty] [InsuredSignatoryParty] [Party] [Identification] [ID][TO BE FILLED][ID] [Name][TO BE FILLED][Name] [/InsuredSignatoryParty] [InsuranceDeclarationSummaryLineItem] [InsuredValueAmount amountCurrencyID="[TO BE FILLED]"0[/Is: [PolicyEffectiveDateTime]2007-09-21 18:15:40.828[/PolicyEffectiveDateTime] [InsuranceCoverageTerms] [Clause][TO BE FILLED][ShipmentStage] [ShipmentStartPoint] [OriginTransportLocation] [Location] [Name]Hong Kong[/Name] [/Location] [/OriginTransport] [/ShipmentStage] [InsuredCargoLineItem] [ProductItem] [Remarks] [Description][TO BE FILLED][Description] [/Remarks] [/Product] [/InsuranceDeclarationSummaryLineItem] [/InsuranceDeclaration]

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Create Application

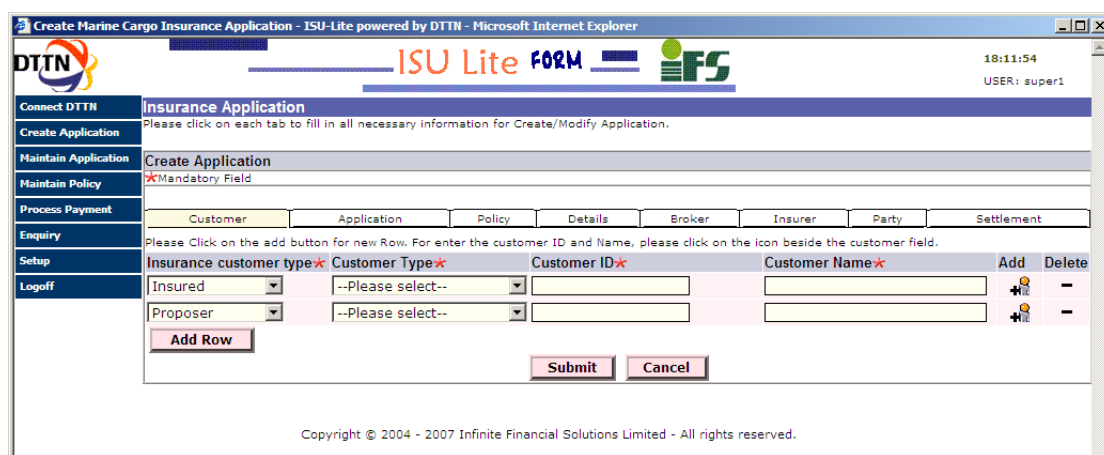
You can create a new insurance application from the 'Create Application' menu. In the insurance application creation page, you can select the broker from the created broker list and others are being default values.

Click 'Create' to input further detail.

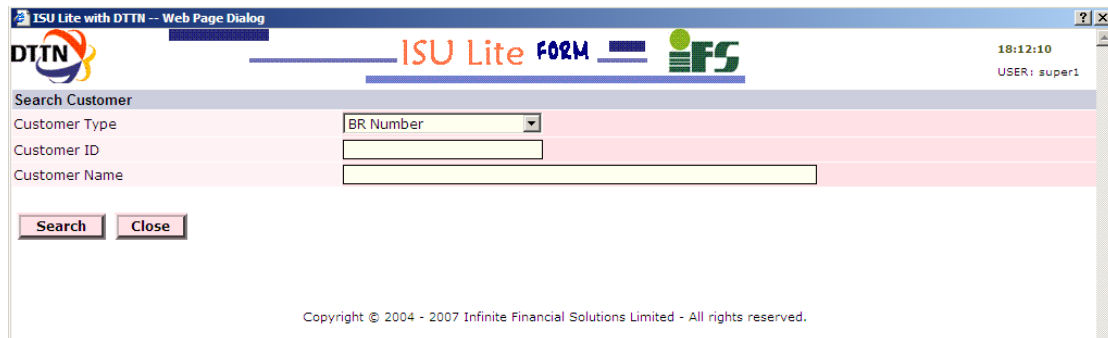


The input details are grouped in to 'Customer', 'Application', 'Policy', 'Details', 'Broker', 'Insurer', 'Party' and 'Settlement'.

In the customer tab, you can click the 'Add' icon to add the customer.



Then the customer selection screen will be shown. Input the search criteria and then click 'Search' to search the customer record.



ISU Lite with DTTN -- Web Page Dialog

DTTN **ISU Lite FORM** IFS

18:12:10
USER: super1

Search Customer

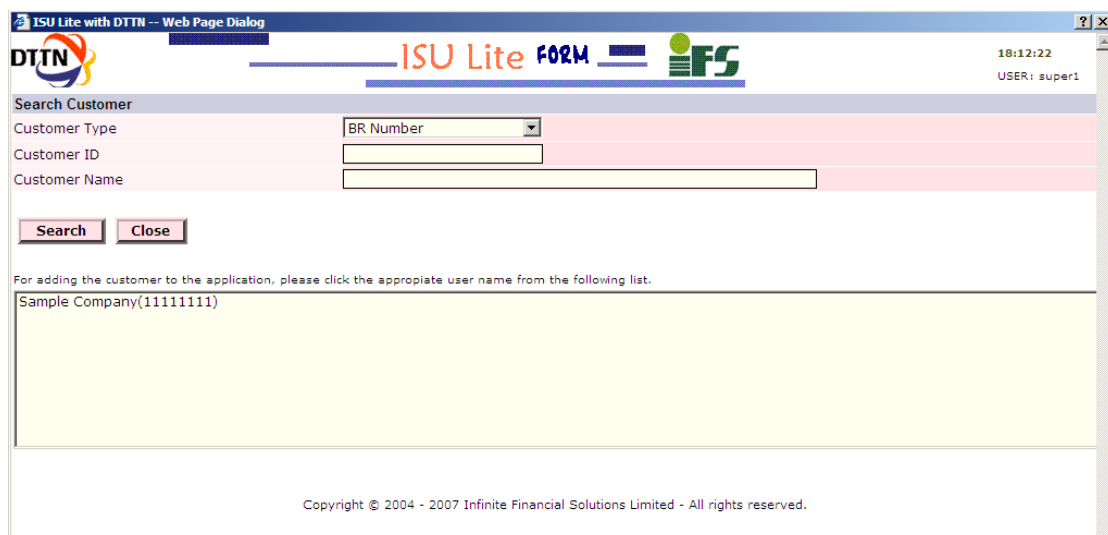
Customer Type

Customer ID

Customer Name

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Then, the list of customer matching the result will be shown.



ISU Lite with DTTN -- Web Page Dialog

DTTN **ISU Lite FORM** IFS

18:12:22
USER: super1

Search Customer

Customer Type

Customer ID

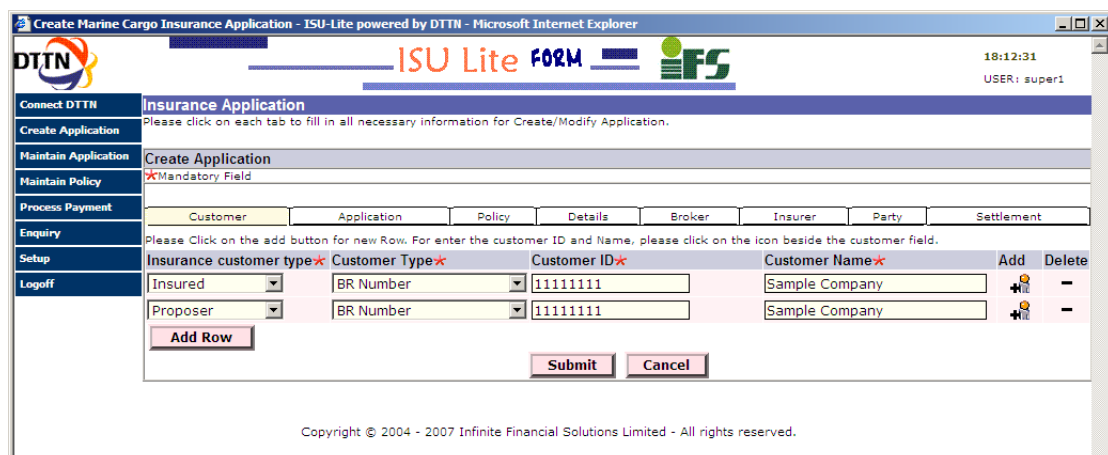
Customer Name

For adding the customer to the application, please click the appropriate user name from the following list.

Sample Company(11111111)

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Click the desired customer and the selected customer will be added onto the application creation screen.



Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS

18:12:31
USER: super1

Connect DTTN **Insurance Application**

Create Application Please click on each tab to fill in all necessary information for Create/Modify Application.

Maintain Application **Create Application**

Maintain Policy *Mandatory Field

Process Payment

Enquiry

Setup

Logoff

Insurance customer type* Customer Type* Customer ID* Customer Name* Add Delete

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insured	BR Number	11111111	Sample Company				
Proposer	BR Number	11111111	Sample Company				

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Next, input the details of the 'Application' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS** 18:13:18
USER: super1

Connect DTTN **Insurance Application**

Create Application Please click on each tab to fill in all necessary information for Create/Modify Application.

Maintain Application **Create Application**

Maintain Policy *Mandatory Field

Process Payment

Enquiry

Setup

Logoff

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Application Information Insurance type General Insurance class Marine Cargo for DTTN Application number* App-000-001 Reference number Business/Occupation Location of Risk Application date* 21/09/2007 Submission date Capture date Application status* Proposal Application status change date 21/09/2007 Last proposal date 21/09/2007 Renewable <input type="checkbox"/>							
+ Application Details For creating the multiple proposals, please click on the plus icon to show the Proposal Section. After proposal section show up, please enter Proposal Insurer and Proposal. + Proposal + Reference Note							

Submit **Cancel**

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

The 'Policy' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS** 18:13:31
USER: super1

Connect DTTN **Insurance Application**

Create Application Please click on each tab to fill in all necessary information for Create/Modify Application.

Maintain Application **Create Application**

Maintain Policy *Mandatory Field

Process Payment

Enquiry

Setup

Logoff

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Policy Information Insurance class Marine Cargo for DTTN Policy number Endorsement number Sequence number Basic Indicator* <input checked="" type="radio"/> Basic <input type="radio"/> Rider Policy issue date Policy effective date Policy expiry date Policy status change date Policy pay-to-date Policy status Proposal Cover Note <input type="checkbox"/> Other Interested Party							
Coverage & Premium Coverage Currency --Please select-- Premium currency HKD Exchange Rate 1 Sum Insured Coverage Premium Total Premium Discount Rate % Discount Amount Client Net Premium Commission rate 0 %							

The 'Details' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

USER: super1

Insurance Application

Please click on each tab to fill in all necessary information for Create/Modify Application.

Create Application

Mandatory Field

Customer Application Policy **Details** Broker Insurer Party Settlement

Marine Cargo Details

Cover note number* CN-000-001

LC Reference number* LC-000-001

LC Currency

LC Amount

Insurance Amount

LC Expiry Date

Annual Open Cover Reference

Trade Term

Vessel Name Sample Vessel

Shipping form Hong Kong

Shipping to 1 Tokyo Japan

Shipping to 2

Lastest Shipment date

Cover note date

Goods description 1 2,000 pieces of IT-Shirt

Goods description 2

Goods description 3

Goods description 4

Goods description 5

Policy Information

Product reference number

The 'Broker' tab.

Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS

18:14:50

USER: super1

Insurance Application

Please click on each tab to fill in all necessary information for Create/Modify Application.

Create Application

Mandatory Field

Customer Application Policy Details **Broker** Insurer Party Settlement

Agency Information

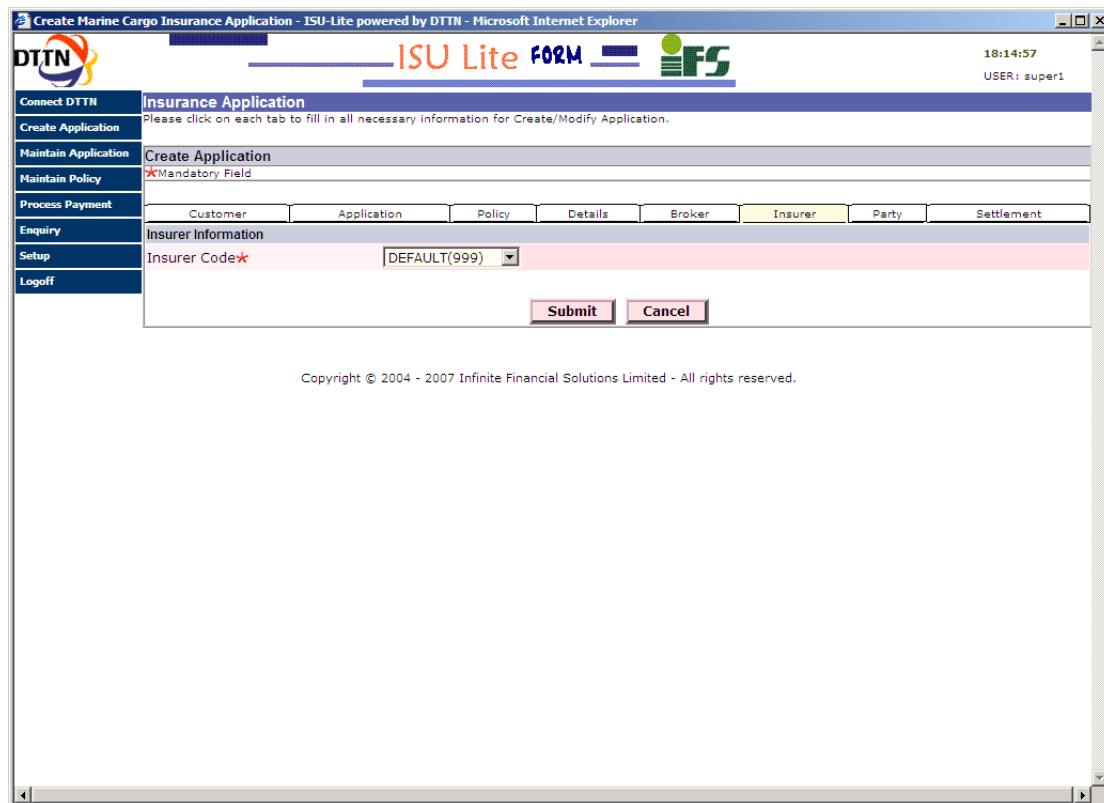
Mode* ☒ Broker

Broker Code* Sample Broker(B1)

Submit **Cancel**

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

The 'Insurer' tab.



DTN **ISU Lite FORM** IFS 18:14:57
USER: super1

Insurance Application

Please click on each tab to fill in all necessary information for Create/Modify Application.

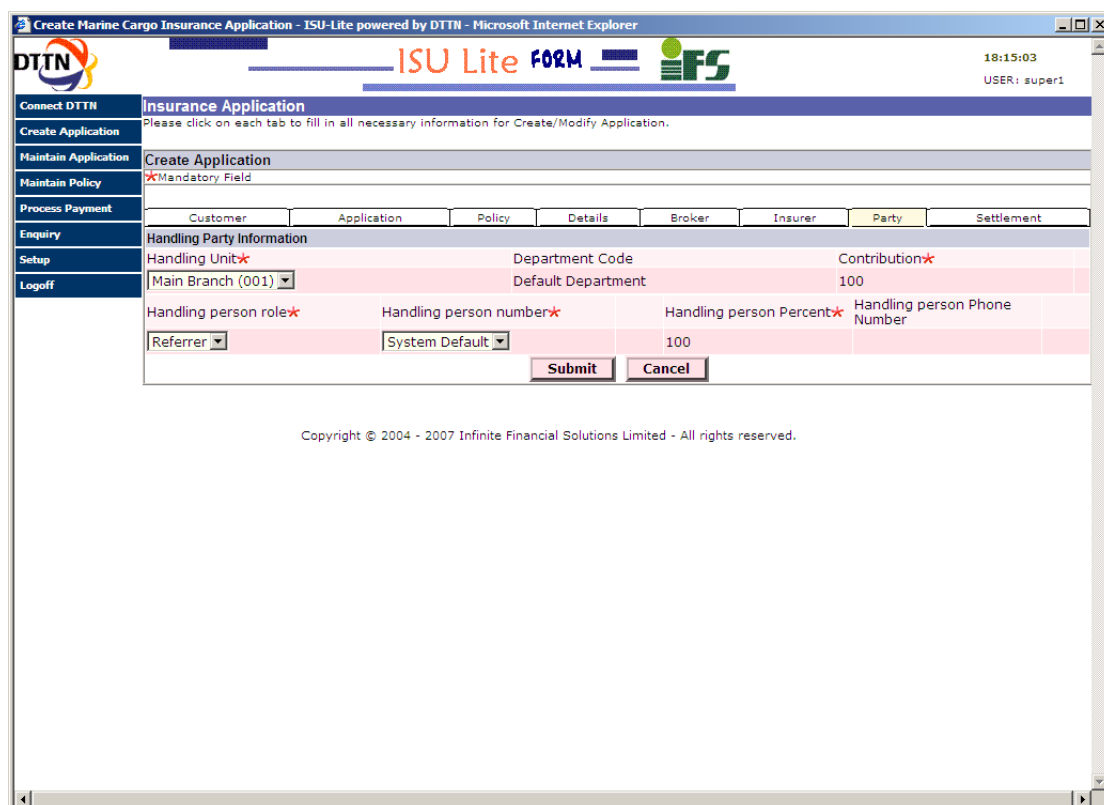
Create Application

*Mandatory Field

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insurer Information Insurer Code* <input type="text" value="DEFAULT(999)"/>							

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

The 'Party' tab.



DTN **ISU Lite FORM** IFS 18:15:03
USER: super1

Insurance Application

Please click on each tab to fill in all necessary information for Create/Modify Application.

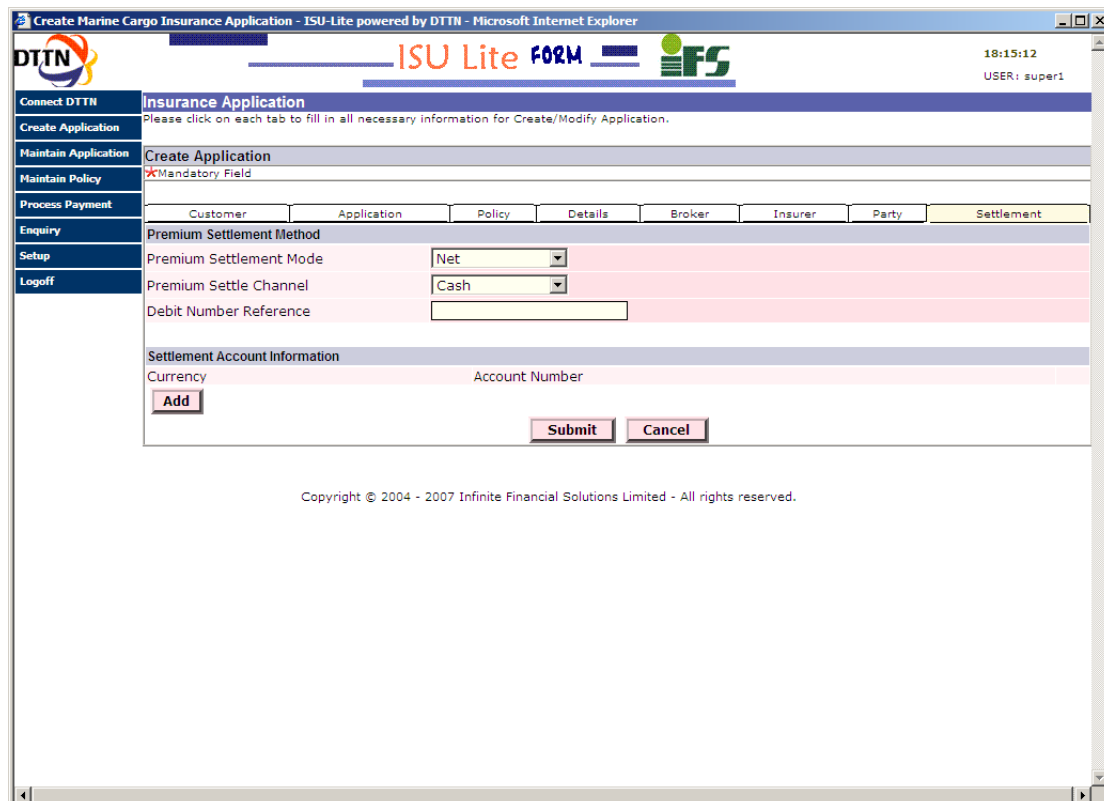
Create Application

*Mandatory Field

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Handling Party Information Handling Unit* <input type="text" value="Main Branch (001)"/> Department Code <input type="text" value="Default Department"/> Contribution* <input type="text" value="100"/> Handling person role* <input type="text" value="Referrer"/> Handling person number* <input type="text" value="System Default"/> Handling person Percent* <input type="text" value="100"/> Handling person Phone Number <input type="text"/>							

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

The 'Settlement' tab.



Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS** 18:15:12
USER: super1

Insurance Application

Please click on each tab to fill in all necessary information for Create/Modify Application.

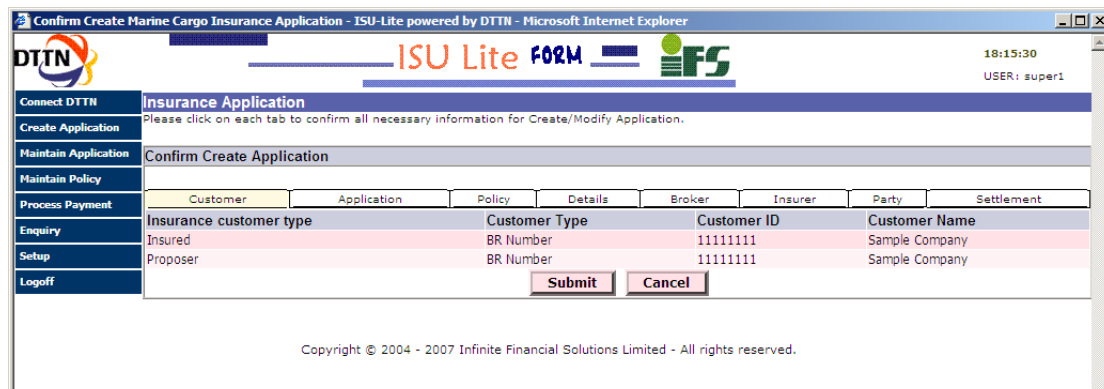
Create Application

Mandatory Field

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Premium Settlement Method							
Premium Settlement Mode				Net			
Premium Settle Channel				Cash			
Debit Number Reference							
Settlement Account Information							
Currency				Account Number			
Add							
				Submit Cancel			

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

After input the details, click the 'Submit' button and the 'Confirmation' page will be shown for confirmation. Click 'Submit' again to confirm the application creation.



Confirm Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS** 18:15:30
USER: super1

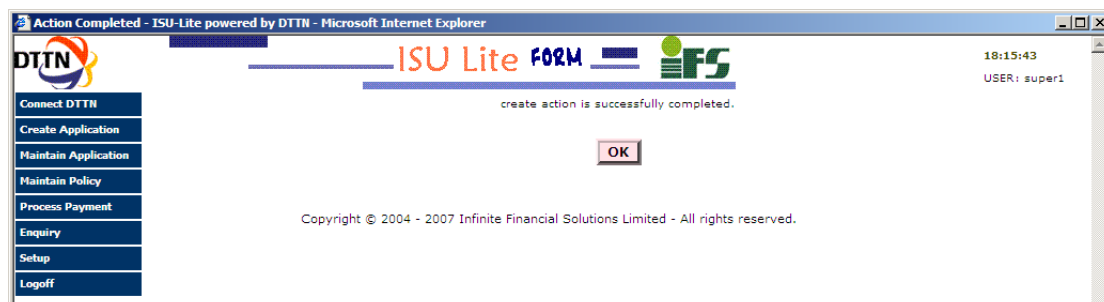
Insurance Application

Please click on each tab to confirm all necessary information for Create/Modify Application.

Confirm Create Application

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insurance customer type							
Insured		Customer Type		Customer ID		Customer Name	
Proposer		BR Number		11111111		Sample Company	
		BR Number		11111111		Sample Company	
				Submit Cancel			

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.



Action Completed - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS** 18:15:43
USER: super1

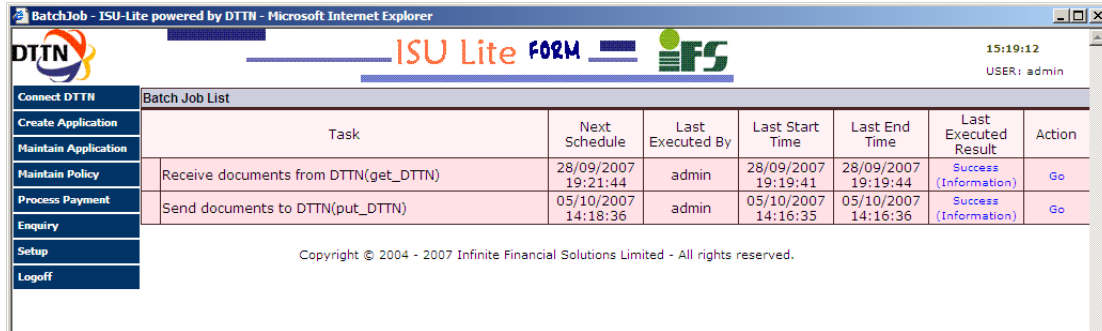
create action is successfully completed.

OK

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

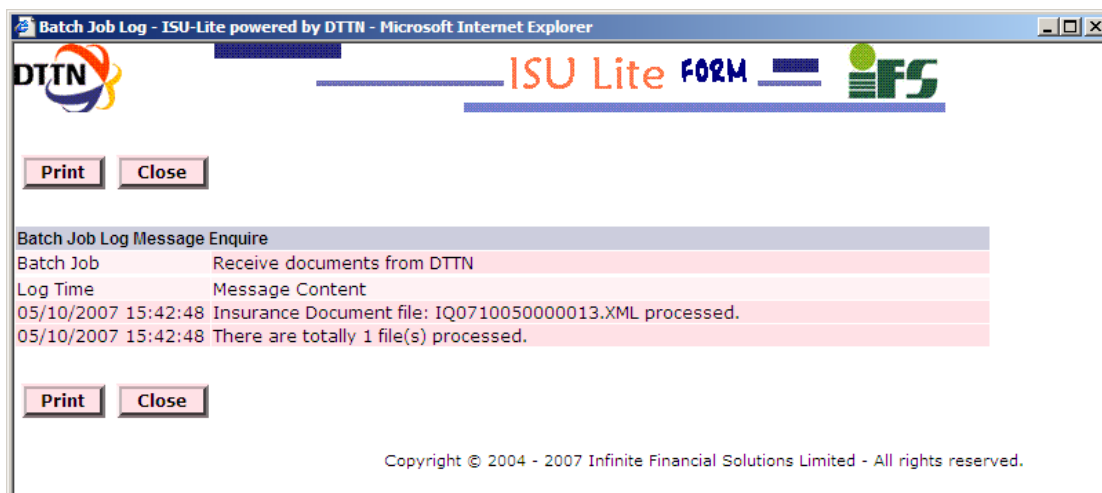
Receive Quotation

The insurance service providers will send the quotation to you after received your application. You can receive quotation from 'Connect DTTN' function.



Task	Next Schedule	Last Executed By	Last Start Time	Last End Time	Last Executed Result	Action
Receive documents from DTTN(get_DTTN)	28/09/2007 19:21:44	admin	28/09/2007 19:19:41	28/09/2007 19:19:44	Success (Information)	Go
Send documents to DTTN(put_DTTN)	05/10/2007 14:18:36	admin	05/10/2007 14:16:35	05/10/2007 14:16:36	Success (Information)	Go

After executing the job 'Receive documents from DTTN', you can check the result:



Batch Job Log Message Enquire

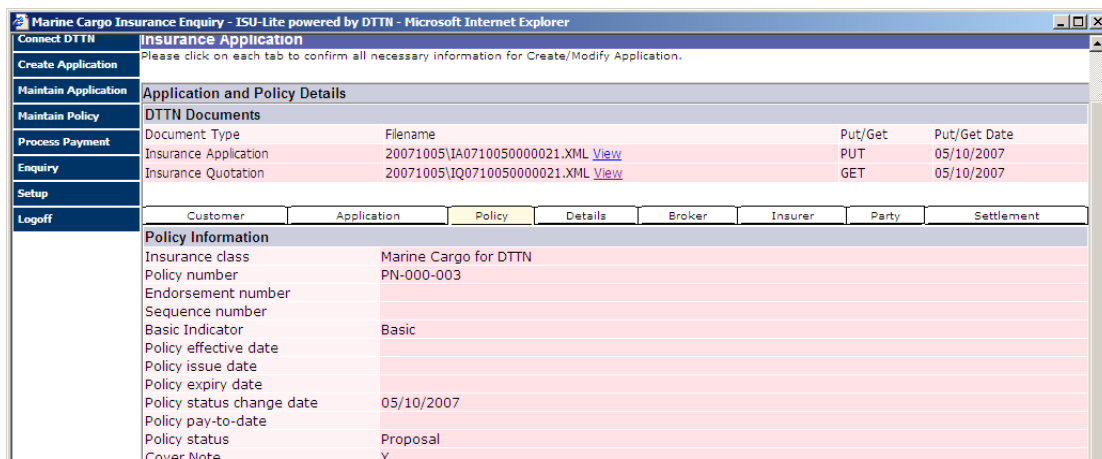
Batch Job: Receive documents from DTTN

Log Time: 05/10/2007 15:42:48

Message Content: Insurance Document file: IQ0710050000013.XML processed.

05/10/2007 15:42:48 There are totally 1 file(s) processed.

And in the enquiry page, you can see that one more document, i.e. the quotation from DTTN is received:



Document Type	Filename	Put/Get	Put/Get Date
Insurance Application	20071005\IA0710050000021.XML View	PUT	05/10/2007
Insurance Quotation	20071005\IQ0710050000021.XML View	GET	05/10/2007

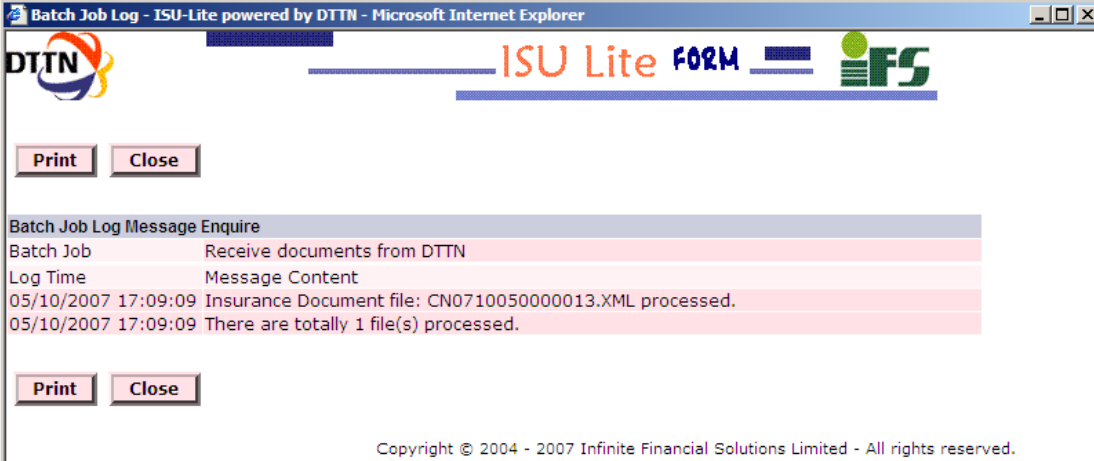
From the 'Put/Get' column, you can tell the Insurance Quotation is 'GOT', i.e. received from DTTN.

Receive Cover Note and Insurance Invoice

Upon your confirmation to the quotation, insurance services provider will send you the cover note as well as the insurance invoice. Similar to receiving quotation, you can receive the document through the 'Receive documents from DTTN' function.

After executing the job 'Receive documents from DTTN', you can check the result:

Received Cover Note:



Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS

Print Close

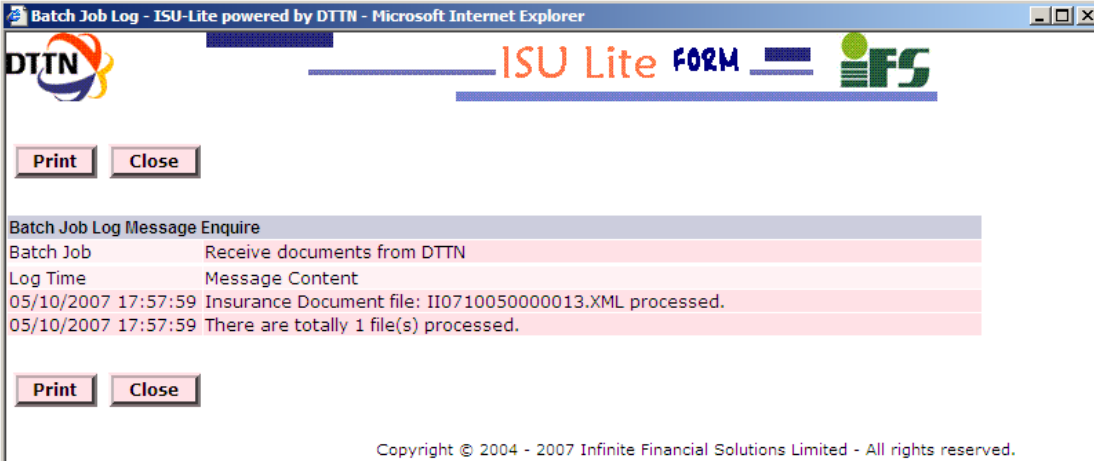
Batch Job Log Message Enquire

Batch Job	Receive documents from DTTN
Log Time	Message Content
05/10/2007 17:09:09	Insurance Document file: CN0710050000013.XML processed.
05/10/2007 17:09:09	There are totally 1 file(s) processed.

Print Close

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Received Invoice:



Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS

Print Close

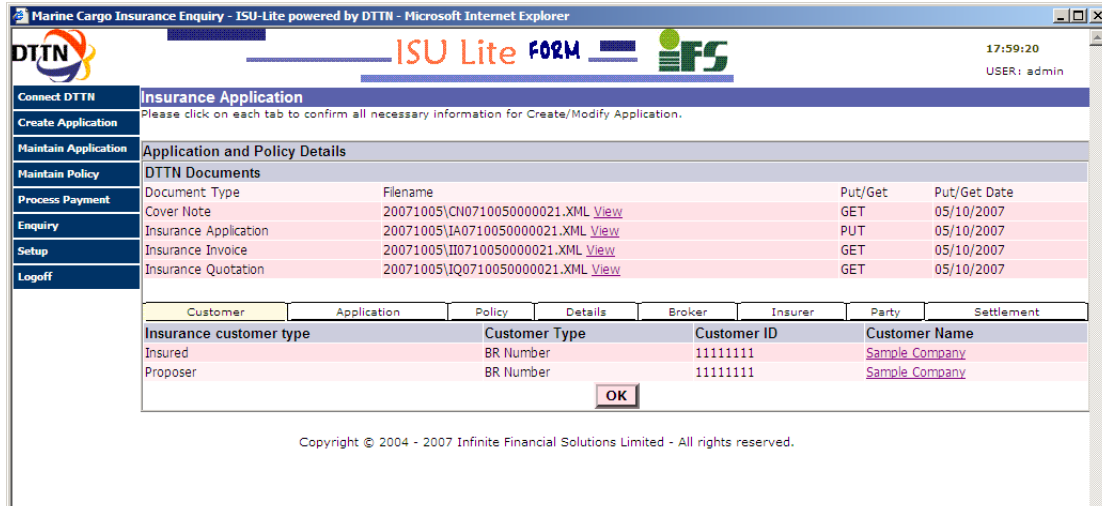
Batch Job Log Message Enquire

Batch Job	Receive documents from DTTN
Log Time	Message Content
05/10/2007 17:57:59	Insurance Document file: II0710050000013.XML processed.
05/10/2007 17:57:59	There are totally 1 file(s) processed.

Print Close

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

And in the enquiry page, you can see that one more document, i.e. the quotation from DTTN is received:



Insurance Application

Please click on each tab to confirm all necessary information for Create/Modify Application.

Document Type	Filename	Put/Get	Put/Get Date
Cover Note	20071005\CN0710050000021.XML View	GET	05/10/2007
Insurance Application	20071005\IA0710050000021.XML View	PUT	05/10/2007
Insurance Invoice	20071005\II0710050000021.XML View	GET	05/10/2007
Insurance Quotation	20071005\IQ0710050000021.XML View	GET	05/10/2007

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insurance customer type	Customer Type	Customer ID	Customer Name				
Insured	BR Number	11111111	Sample Company				
Proposer	BR Number	11111111	Sample Company				

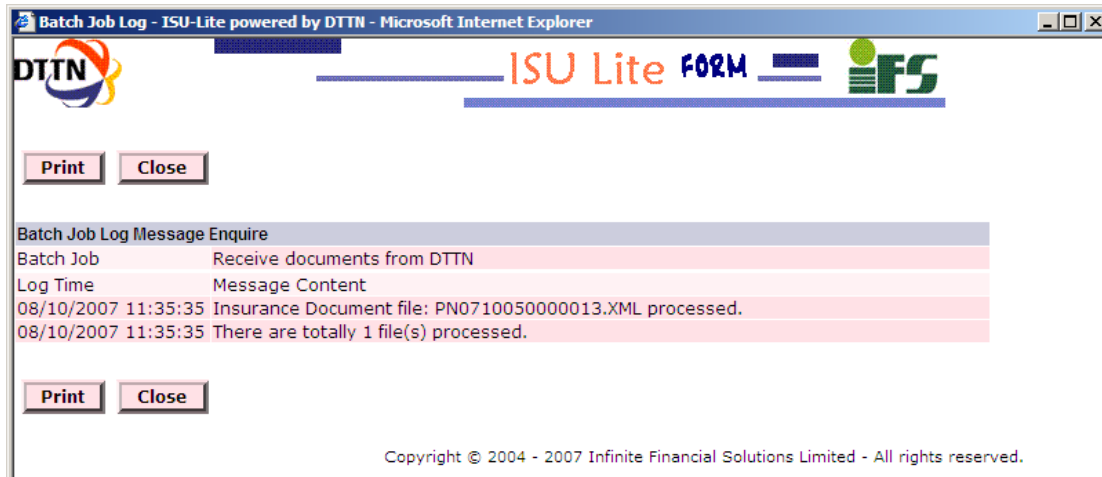
Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Receive Payment Confirmation

After you have paid according to the invoice and notification is received by the insurance service provider, a payment confirmation document will be sent to you. Similar to receiving other documents, you can receive the document through the 'Receive documents from DTTN' function.

After executing the job 'Receive documents from DTTN', you can check the result:

Received Payment Confirmation:



Batch Job Log

Batch Job Log Message Enquire

Batch Job	Message Content
Receive documents from DTTN	
Log Time	08/10/2007 11:35:35
Message Content	Insurance Document file: PN0710050000013.XML processed.
	There are totally 1 file(s) processed.

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

From the application enquiry screen, you can see that one more document of payment confirmation is received. In addition, the status of settlement tab shows that the payment is settled:

Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS** 11:39:03
USER: admin

Connect DTTN **Insurance Application**

Create Application Please click on each tab to confirm all necessary information for Create/Modify Application.

Maintain Application **Application and Policy Details**

Maintain Policy **DTTN Documents**

Document Type	Filename	Put/Get	Put/Get Date
Cover Note	20071005\CN0710050000021.XML View	GET	05/10/2007
Insurance Application	20071005\IA0710050000021.XML View	PUT	05/10/2007
Insurance Invoice	20071005\II0710050000021.XML View	GET	05/10/2007
Insurance Quotation	20071005\IQ0710050000021.XML View	GET	05/10/2007
Payment Confirmation	20071008\PN0710050000021.XML View	GET	08/10/2007

Process Payment

Enquiry

Setup

Logoff

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Premium Settlement History							
Collection Date	Premium Settlement Mode	Premium Settle Channel	Premium	Settled Premium	Premium Settlement Reference	Debit / Credit	Status
08/10/2007	Net	Cash		100,000.00	payment done on 8.10.2007		ST
Premium Settlement Method							
Premium Settlement Mode				Net			
Premium Settle Channel				Cash			
Premium Settlement Reference							
Is GL Generated							
Settlement Account Information							
Currency		Account Number					
OK							

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Receive Insurance Policy or Certificate

Insurance services provider will issue to you either an insurance policy or an insurance certificate. You can receive the document as above. The result is as follows:

Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS**

Print **Close**

Batch Job Log Message Enquire

Batch Job	Message Content
Log Time	08/10/2007 14:37:48
Message Content	Insurance Document file: IP0710050000011.XML processed.
	There are totally 1 file(s) processed.

Print **Close**

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

And the status is shown as 'Policy Issued':

Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS** 14:39:01
USER: admin

Connect DTTN **Insurance Application**

Create Application Please click on each tab to confirm all necessary information for Create/Modify Application.

Maintain Application **Application and Policy Details**

Maintain Policy **DTTN Documents**

Document Type	Filename	Put/Get	Put/Get Date
Cover Note	20071005\CN0710050000021.XML View	GET	05/10/2007
Insurance Application	20071005\IA0710050000021.XML View	PUT	05/10/2007
Insurance Invoice	20071005\II0710050000021.XML View	GET	05/10/2007
Insurance Policy	20071008\IP0710050000021.XML View	GET	08/10/2007
Insurance Quotation	20071005\IQ0710050000021.XML View	GET	05/10/2007
Payment Confirmation	20071008\PN0710050000021.XML View	GET	08/10/2007

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Application information							
Insurance type	General						
Insurance class	Marine Cargo for DTTN						
Application number	0710050000021						
Reference number							
Business/Occupation							
Location of Risk							
Application date	21/09/2007						
Submission date							
Capture date							
Application status	Policy Issued PI						
Application status change date	08/10/2007						
Last proposal date	21/09/2007						

For receiving insurance certificate:

Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS**

Print **Close**

Batch Job Log Message Enquire

Batch Job	Receive documents from DTTN
Log Time	Message Content
09/10/2007 09:28:47	Insurance Document file: IC0710080000020.XML processed.
09/10/2007 09:28:47	There are totally 1 file(s) processed.

Print **Close**

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

And the enquiry screen showing the certificate received:

Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS** 09:31:12
USER: admin

Connect DTTN **Insurance Application**

Create Application Please click on each tab to confirm all necessary information for Create/Modify Application.

Maintain Application **Application and Policy Details**

Maintain Policy **DTTN Documents**

Document Type	Filename	Put/Get	Put/Get Date
Insurance Certificate	20071009\IC0710080000030.XML View	GET	08/10/2007
Insurance Declaration	20071008\ID0710080000030.XML View	PUT	08/10/2007

Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insurance customer type							
Insured	BR Number	11111111	Customer ID	Sample Company			
Proposer	BR Number	11111111	Customer Name	Sample Company			

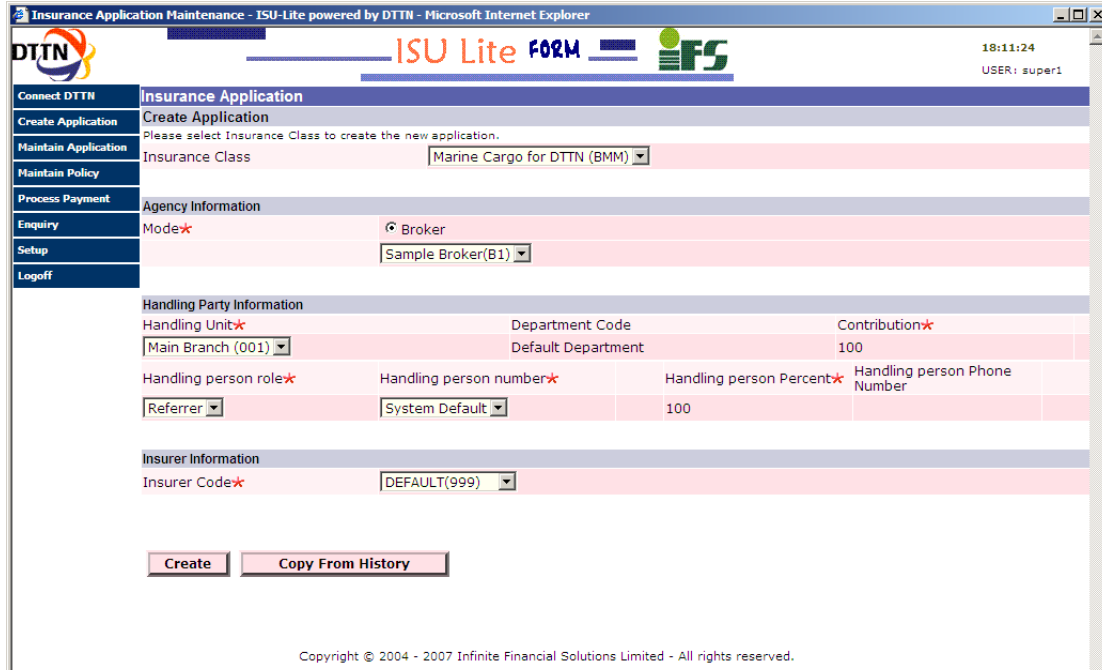
OK

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Create Declaration

You can create insurance declaration from the system by using the copy function in the application creation screen. You may create a new one starting from scratch as well but please note that the cover note number should be the same for the cover note previously issued.

Select 'Copy From History':



Insurance Application Maintenance - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN ISU Lite FORM IFS 18:11:24 USER: super1

Connect DTTN Insurance Application

Create Application Create Application

Please select Insurance Class to create the new application.

Maintain Application Insurance Class Marine Cargo for DTTN (BMM)

Maintain Policy

Process Payment

Agency Information

Enquiry Mode* Broker

Setup Sample Broker(B1)

Logoff

Handling Party Information

Handling Unit* Main Branch (001)

Department Code Default Department 100

Handling person role* Referrer

Handling person number* System Default

Handling person Percent* 100

Handling person Phone Number

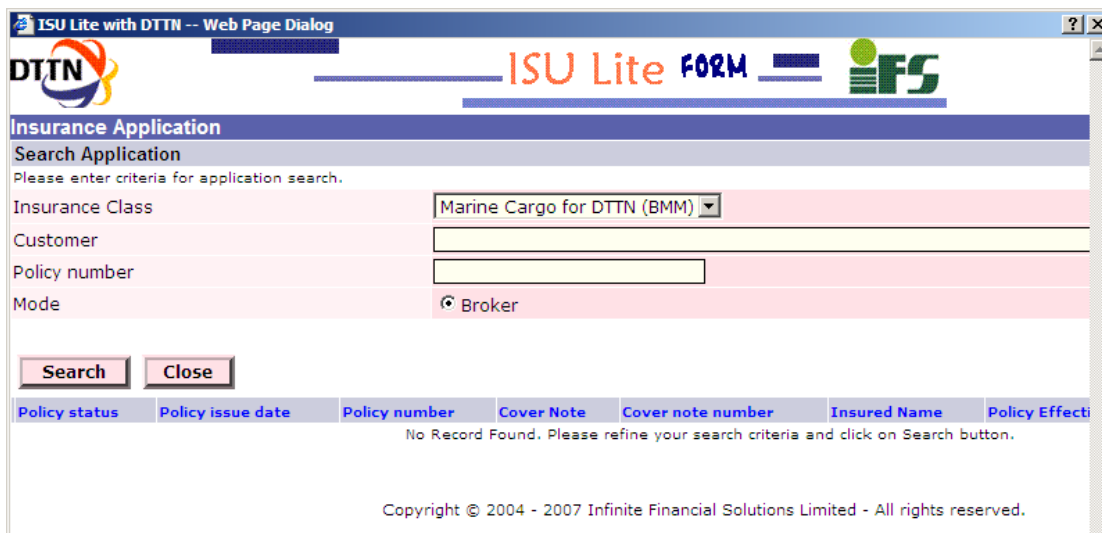
Insurer Information

Insurer Code* DEFAULT(999)

Create Copy From History

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Then, a selection screen will be shown for searching old policy:



ISU Lite with DTTN -- Web Page Dialog

DTTN ISU Lite FORM IFS

Insurance Application

Search Application

Please enter criteria for application search.

Insurance Class Marine Cargo for DTTN (BMM)

Customer

Policy number

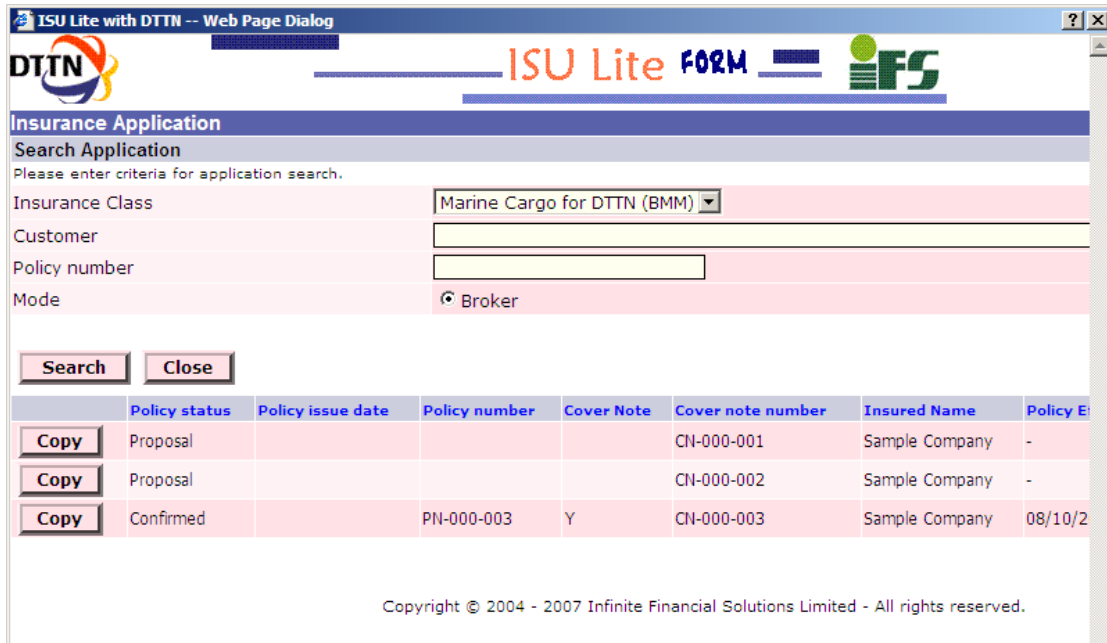
Mode Broker

Search Close

Policy status	Policy issue date	Policy number	Cover Note	Cover note number	Insured Name	Policy Effect
No Record Found. Please refine your search criteria and click on Search button.						

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

The result list will be shown after clicking the 'Search' button:



ISU Lite FORM

Insurance Application

Search Application
Please enter criteria for application search.

Insurance Class: Marine Cargo for DTTN (BMM)

Customer:

Policy number:

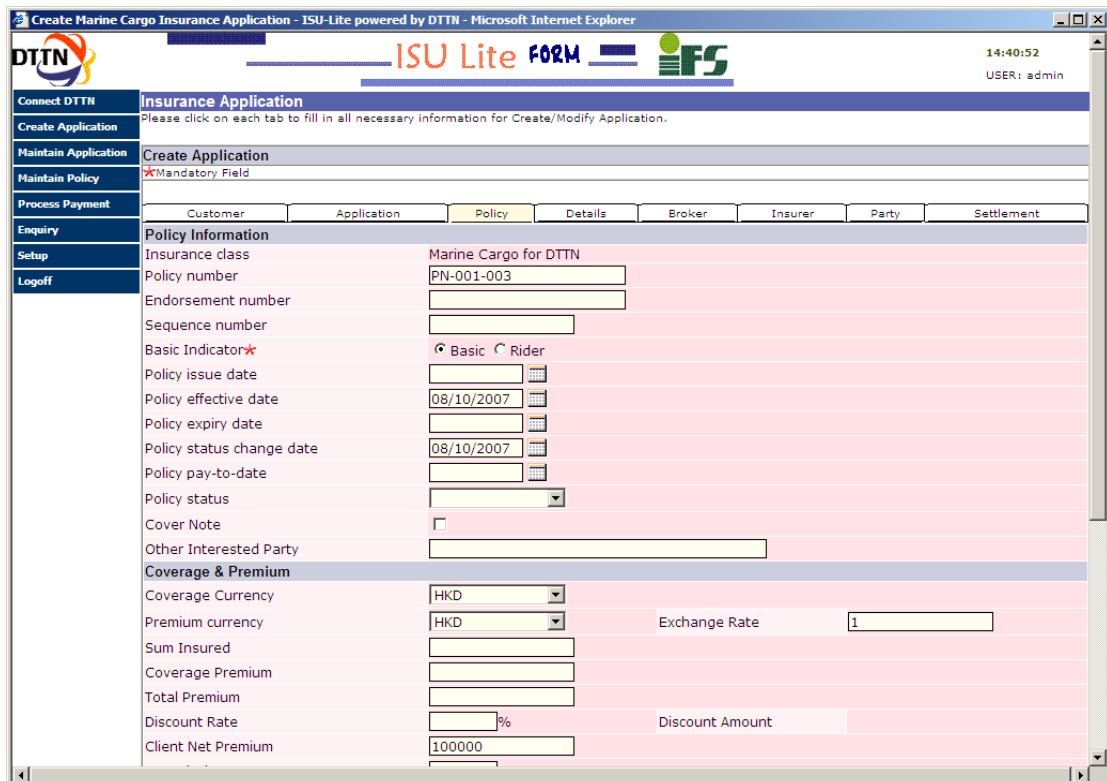
Mode: ☒ Broker

Search **Close**

	Policy status	Policy issue date	Policy number	Cover Note	Cover note number	Insured Name	Policy E
Copy	Proposal				CN-000-001	Sample Company	-
Copy	Proposal				CN-000-002	Sample Company	-
Copy	Confirmed		PN-000-003	Y	CN-000-003	Sample Company	08/10/2

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Then you can click the 'Copy' button to copy the existing policy. Then, the application creation screen will be filled with previous data. We should update the fields accordingly. For declaration creation, please uncheck the box 'Cover Note'.



Create Marine Cargo Insurance Application - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** **IFS**

14:40:52
USER: admin

Connect DTTN **Insurance Application**
Please click on each tab to fill in all necessary information for Create/Modify Application.

Create Application
*Mandatory Field

Maintain Application

Maintain Policy

Process Payment

Enquiry

Setup

Logoff

Customer Application Policy Details Broker Insurer Party Settlement

Policy Information

Insurance class: Marine Cargo for DTTN

Policy number: PN-001-003

Endorsement number:

Sequence number:

Basic Indicator*: ☒ Basic ☐ Rider

Policy issue date:

Policy effective date: 08/10/2007

Policy expiry date:

Policy status change date: 08/10/2007

Policy pay-to-date:

Policy status:

Cover Note: ☐

Other Interested Party:

Coverage & Premium

Coverage Currency: HKD

Premium currency: HKD

Sum Insured:

Coverage Premium:

Total Premium:

Discount Rate: %

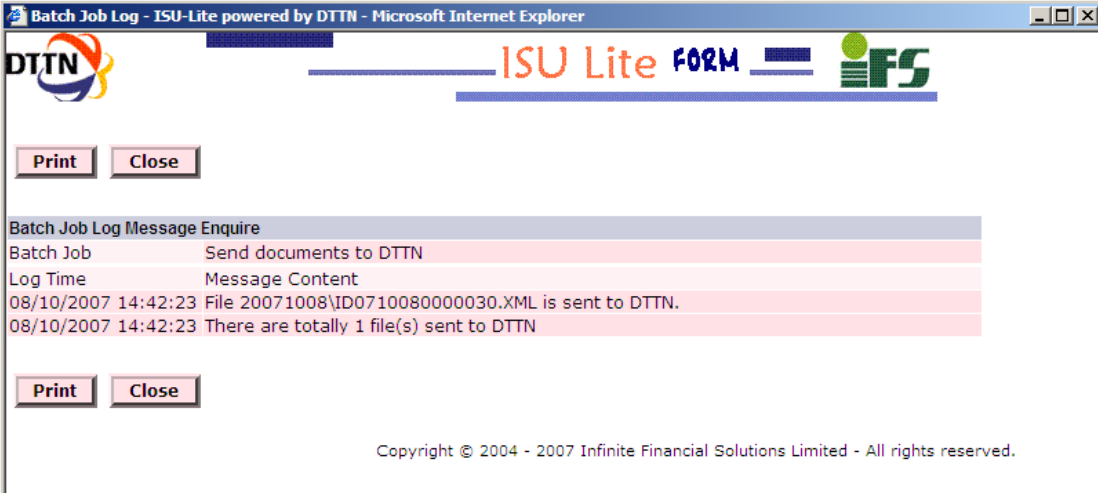
Client Net Premium: 100000

Exchange Rate: 1

Discount Amount:

Similar as creating an application, we have to click the 'Submit' button, then the confirmation page will be shown and you have to confirm the submission accordingly.

After the creation, a declaration document is ready for sending to DTTN. You can use the 'Send documents to DTTN' function to send the declaration document.



Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS

Print Close

Batch Job Log Message Enquire	
Batch Job	Message Content
Send documents to DTTN	
Log Time	Message Content
08/10/2007 14:42:23	File 20071008\ID0710080000030.XML is sent to DTTN.
08/10/2007 14:42:23	There are totally 1 file(s) sent to DTTN

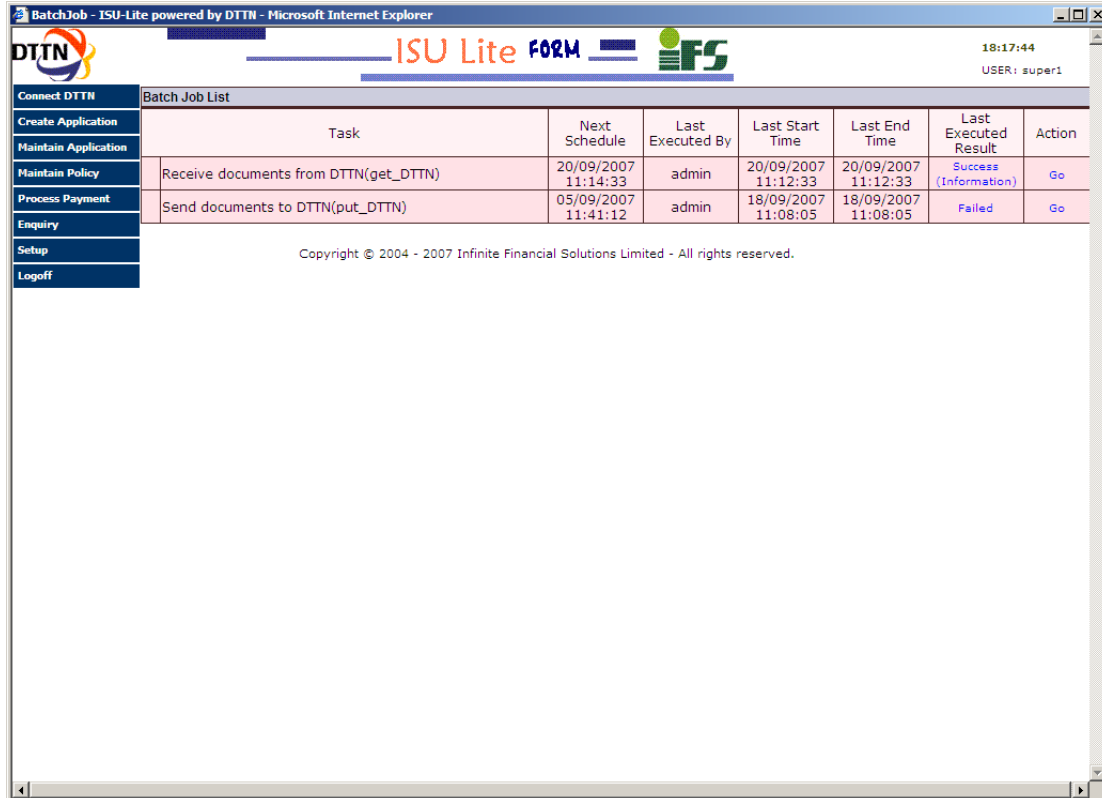
Print Close

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Connect DTTN

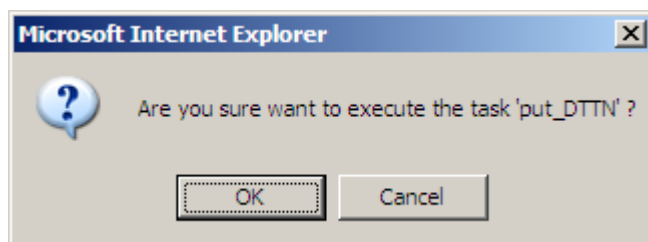
Send documents to DTTN

After the creation of documents in the system, supervisor can send the documents to the receipting party through DTTN. You can start the 'Send' function from 'Connect DTTN' menu. The 'Batch Job List' will be shown with two tasks. You can click the 'Go' button of 'Send documents to DTTN(put_DTTN)' to send the documents prepared in the system to DTTN.

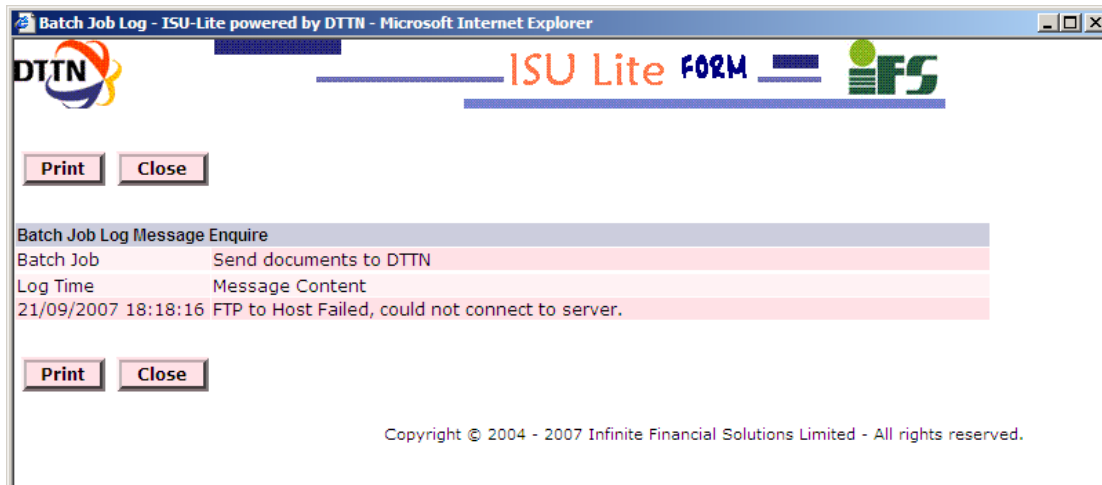


Task	Next Schedule	Last Executed By	Last Start Time	Last End Time	Last Executed Result	Action
Receive documents from DTTN(get_DTTN)	20/09/2007 11:14:33	admin	20/09/2007 11:12:33	20/09/2007 11:12:33	Success (Information)	Go
Send documents to DTTN(put_DTTN)	05/09/2007 11:41:12	admin	18/09/2007 11:08:05	18/09/2007 11:08:05	Failed	Go

The system will further ask you for confirmation before actual execution.



You can also click the link in the column 'Last Executed Result' to view the last execution result. For example, the following message indicated that the job failed last time as the system can not connect to DTTN network.



Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS

Print Close

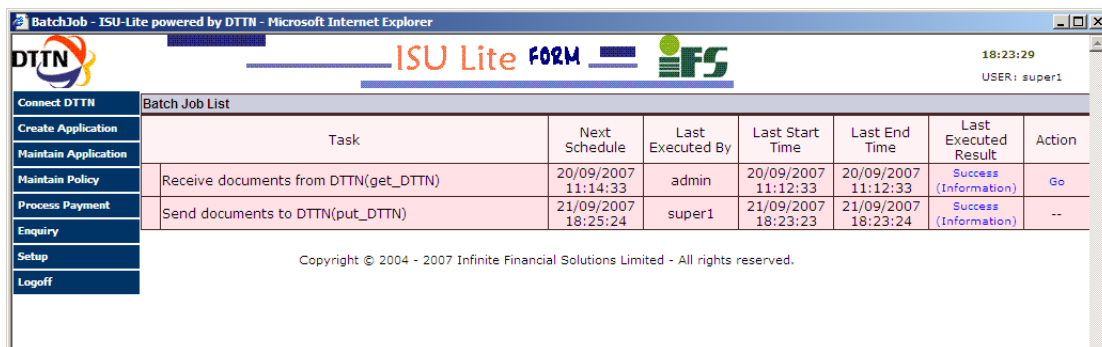
Batch Job Log Message Enquire

Batch Job	Send documents to DTTN
Log Time	Message Content
21/09/2007 18:18:16	FTP to Host Failed, could not connect to server.

Print Close

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

After the job is executed successfully, the last start time and last end time fields will be updated.



BatchJob - ISU-Lite powered by DTTN - Microsoft Internet Explorer

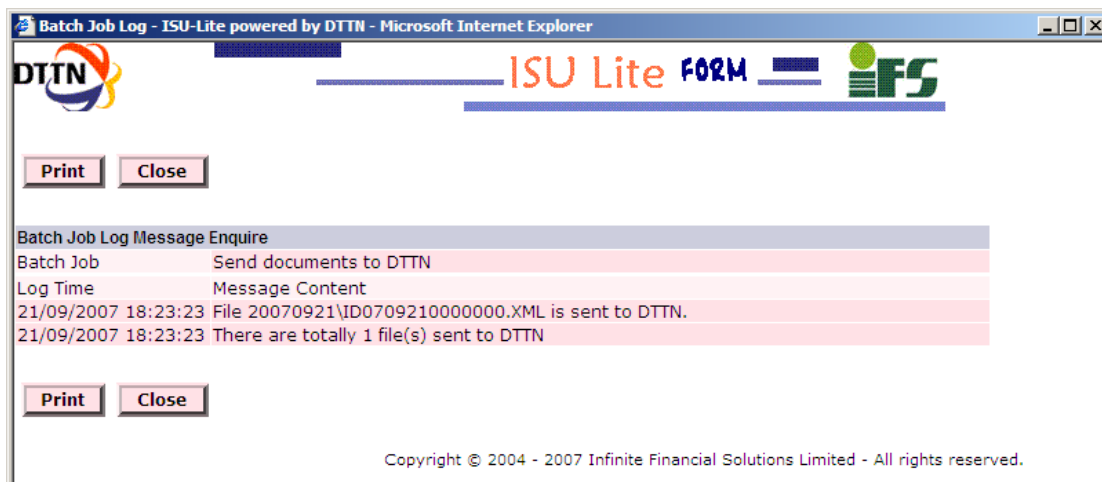
DTTN **ISU Lite FORM** IFS

18:23:29
USER: super1

Task	Next Schedule	Last Executed By	Last Start Time	Last End Time	Last Executed Result	Action
Receive documents from DTTN(get_DTTN)	20/09/2007 11:14:33	admin	20/09/2007 11:12:33	20/09/2007 11:12:33	Success (Information)	Go
Send documents to DTTN(put_DTTN)	21/09/2007 18:25:24	super1	21/09/2007 18:23:23	21/09/2007 18:23:24	Success (Information)	--

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

We can click the link to see the result. We can see that it shows that one document is sent to DTTN.



Batch Job Log - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS

Print Close

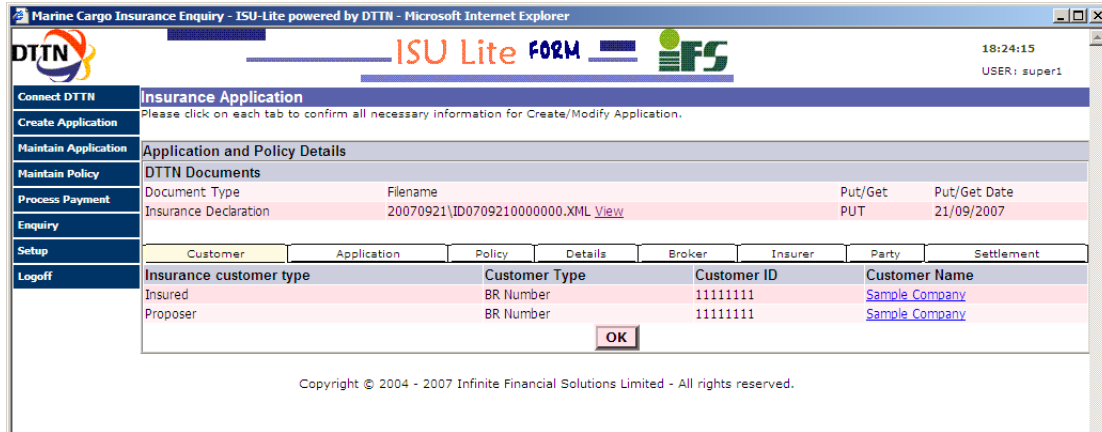
Batch Job Log Message Enquire

Batch Job	Send documents to DTTN
Log Time	Message Content
21/09/2007 18:23:23	File 20070921\ID0709210000000.XML is sent to DTTN.
21/09/2007 18:23:23	There are totally 1 file(s) sent to DTTN

Print Close

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

We can enquire the document once again and see that the 'Put/Get Date' column is updated after the document is sent to DTTN.



Marine Cargo Insurance Enquiry - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS 18:24:15
USER: super1

Connect DTTN **Insurance Application**
Please click on each tab to confirm all necessary information for Create/Modify Application.

Create Application

Maintain Application **Application and Policy Details**

Maintain Policy **DTTN Documents**

Document Type	Filename	Put/Get	Put/Get Date
Insurance Declaration	20070921\ID0709210000000.XML View	PUT	21/09/2007

Enquiry

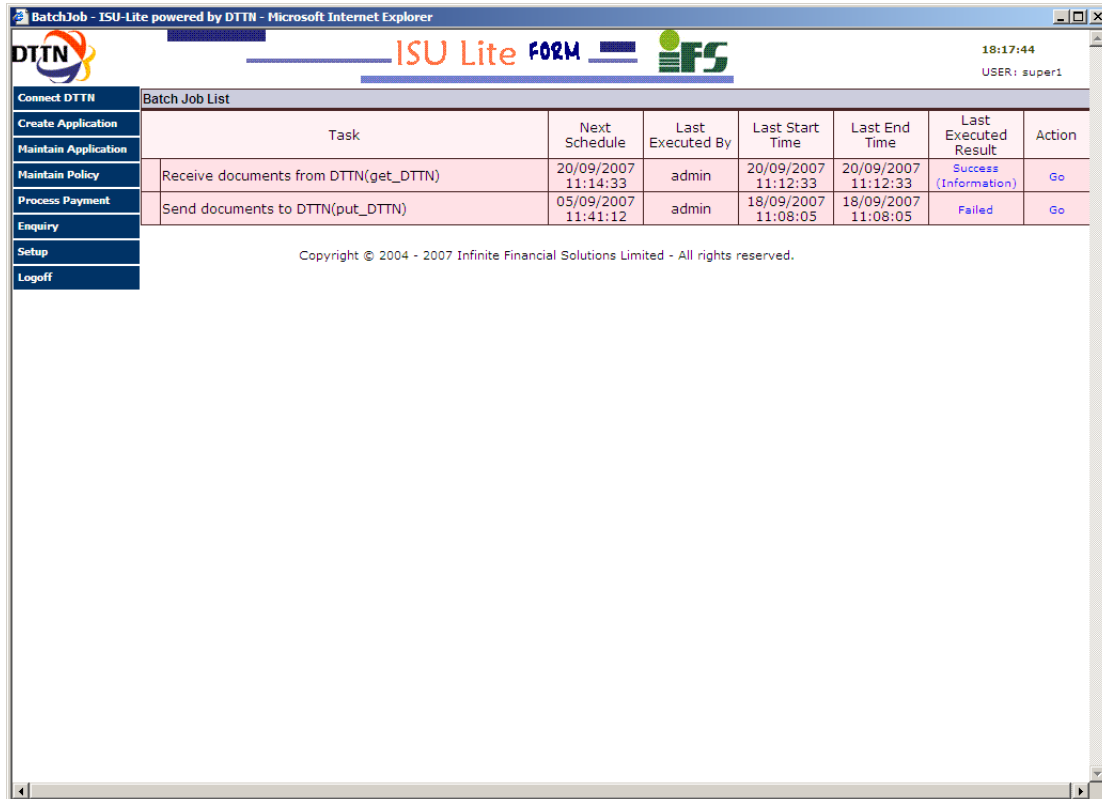
Customer	Application	Policy	Details	Broker	Insurer	Party	Settlement
Insurance customer type		Customer Type		Customer ID		Customer Name	
Insured		BR Number		11111111		Sample Company	
Proposer		BR Number		11111111		Sample Company	

Setup **Logoff**

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

Receive documents from DTTN

You can start the 'Receive' function from 'Connect DTTN' menu. The 'Batch Job List' will be shown with two tasks. You can click the 'Go' button of 'Receive Document from DTTN(get_DTTN)' to receive the documents sent from the counterparties through DTTN.



BatchJob - ISU-Lite powered by DTTN - Microsoft Internet Explorer

DTTN **ISU Lite FORM** IFS 18:17:44
USER: super1

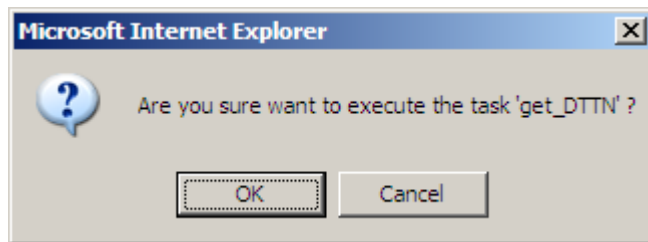
Connect DTTN **Batch Job List**

Task	Next Schedule	Last Executed By	Last Start Time	Last End Time	Last Executed Result	Action
Receive documents from DTTN(get_DTTN)	20/09/2007 11:14:33	admin	20/09/2007 11:12:33	20/09/2007 11:12:33	Success (Information)	Go
Send documents to DTTN(put_DTTN)	05/09/2007 11:41:12	admin	18/09/2007 11:08:05	18/09/2007 11:08:05	Failed	Go

Create Application **Maintain Application** **Maintain Policy** **Process Payment** **Enquiry** **Setup** **Logoff**

Copyright © 2004 - 2007 Infinite Financial Solutions Limited - All rights reserved.

The system will further ask you for confirmation before actual execution.



After the job is executed successfully, the last start time and last end time fields will be updated and you can click the link the see the result.

